MANUAL

Peter Meurer, Jennifer Schultz, Antonio Tejada

Contents

Chapter 1 1 Introduction

Chapter 2 2 Getting Started
2 Installing Citavi and Checking for Updates
2 Installing Citavi
2 Entering a License Key
3 Updating Citavi
3 Moving to a New Computer
4 Uninstalling Citavi
4 A Tour of Citavi
4 Key Terms and Concepts
5 Navigating Citavi
6 The Reference Editor
7 The Knowledge Organizer
8 The Task Planner
9 Preview
9 Getting Help
10 Citavi Pickers
11 Starting a New Project
12 Setting Up a New Project
12 Adding a Reference
13 Searching a Library Catalog
13 Describing References
14 Setting Up Citavi
14 Adding Tasks
15 Searching in a Project
16 Obtaining Sources
17 Building Knowledge
18 Creating Project Bibliographies
18 Creating a Publication

Chapter 3 20 Adding References
20 Why and How We Cite
21 Adding References Automatically
21 Adding a Book by ISBN Number
21 Adding Multiple Books by ISBN Number
22 Adding References with a Bar Code Scanner
23 Adding Articles by DOI or PubMed ID
23 Importing PDF Files
24 Adding References Manually
24 Adding a New Reference by Hand
25 Setting Favorite Reference Types
25 Reference Types in Citavi
28 Changing Reference Types
28 Short Titles, Citations, and Citation Keys
29 Duplicating a Reference
30 Tips for Names of Persons
32 Entering Special Characters
32 Four Examples of Adding References

Contents

33 Adding a Book
35 Adding a Contribution in an Edited Book
37 Adding a Journal Article
38 Adding an Internet Document
38 Special Reference Types
39 Adding a Festschrift
40 Adding Collected Essays
40 Adding a Special Issue
42 Adding a Loose-Leaf Collection
44 Adding a Report
45 Adding an Encyclopedia Entry
48 Adding a Multivolume Work

Chapter 4 50 Searching Online
50 Developing a Search Strategy
50 What Makes a Good Search Stategy?
50 Choosing Search Terms
51 Choosing Online Resources
51 Performing a Search
51 Searching from Citavi
55 Searching Web Resources and Importing Search Results

Chapter 5 58 Working with Citavi Pickers
58 Pickers for Firefox and Internet Explorer
58 Adding an Internet Document
59 Saving Screenshots
59 Copying Text with its URL
59 Adding a Quotation
59 Saving Images
59 Finding Reference Information by ISBN
60 Searching Databases with the Picker
61 Starting a Search with the Picker
61 Importing Search Results with a Click
61 Picker for Adobe Reader and Acrobat
61 Adding PDF Files
62 Saving Text as a Quotation
63 Saving Images
63 Searching Databases with the Picker for Adobe

Chapter 6 64 Importing and Exporting
64 Importing from Other Reference Management Programs
64 Importing from Bibliographix
65 Importing from Biblioscape
65 Importing from EndNote
67 Importing from LIDOS
68 Importing from ProCite
68 Importing from Reference Manager
68 Importing from Zotero
69 Importing Text Files
69 Importing a BibTeX File

Contents

70 Importing a RIS File
73 Importing an EndNote Tagged File
76 Importing Other Formats
76 Importing a Database, Spreadsheet, or CSV File
77 Importing a Formatted Bibliography
79 Exporting from Citavi
79 Exporting to Another Citavi Project
80 Copying Data to the Clipboard
80 Exporting to RIS
80 Exporting to BibTeX
82 Exporting to EndNote
82 Exporting to Excel or Calc
82 Saving Export Presets

Chapter 7 84 Editing References
84 Editing or Deleting References
85 Adding Cover Art
86 Verifying the Accuracy of References
86 Linking Files to References
87 Labels
88 Creating a Table of Contents
88 Applying Keywords
90 Evaluating a Bibliography
90 Recording Locations
90 Adding Notes

Chapter 8 92 Searching, Selecting, and Sorting in a Project
92 Searching and Selecting
92 Switching to a Known Reference
93 Quick Select
94 Quick Search
95 Advanced Search
95 Managing the Number of Search Results
95 Defining Equivalent Characters
95 Using Field Codes
96 Searching with Boolean Operators: AND, OR, NOT
97 Searching with Comparison Operators
98 Searching with Wildcards
98 Searching with Regular Expressions
99 Actions After a Search
99 Sorting and Grouping
99 Sorting in Table View
100 Adding Columns
100 Grouping References

Chapter 9 101 Task Planning
101 Adding Tasks
101 Creating Your Own Tasks
102 Adding a Project Task
102 Viewing Tasks

Contents

103 Printing Task Lists
103 Tracking Your Progress

Chapter 10 104 **Obtaining Materials**
104 Locating Books
105 Checking Availability Using OpenURL
107 Finding Full-Text Articles
107 Ordering Books and Articles

Chapter 11 109 **Retaining and Organizing Knowledge**
109 Writing Abstracts and Comments
109 Creating and Saving Abstracts
110 Evaluating a Reference
110 Documenting Relationships
111 Adding Quotations
111 Basic Principles of Citation
112 Quoting a Text Passage
113 Quoting Secondary Quotations
113 Editing a Quotation
114 Adding Thoughts
115 Outlining with Categories
116 Creating Categories
117 Assigning Categories
118 Importing and Exporting Categories
119 Organizing and Printing Quotations and Thoughts
119 Organizing Quotations and Thoughts Manually
121 Printing a Compilation of Quotations and Thoughts
121 Citing Quickly

Chapter 12 122 **Creating Publications**
122 Creating a Project Bibliography
122 Creating a Simple Project Bibliography
123 Creating an Annotated Project Bibliography
123 Creating a Grouped Bibliography
124 Creating a Publication with Word or Writer
124 The Publication Assistant
125 Inserting References into a Publication
126 Inserting Quotations and Thoughts into a Publication
127 Advanced Placeholder Options
129 Formatting a Publication
129 Creating a Publication with TeX
130 Generating BibTeX Keys
131 Generating a BibTeX File
132 Using the Publication Assistant with TeX
133 Inserting Formulas in Quotations

Chapter 13 134 **Citation Styles**
134 Using Citation Styles
134 Changing the Citation Style
135 Creating Citation Styles
135 Anatomy of a Citation Style

Contents

136 The Citation Style Editor
138 Creating a New Citation Style
138 Rules of Thumb
139 Assembling Rule Sets
140 Taking Advantage of Similar Use Cases
140 Punctuation
141 Component Properties
142 Creating a New Component
143 Using Special Components
144 Names of Persons
145 Dates
146 Numbers
146 Page Numbers
147 Names of Periodicals and Series
147 Setting the Edit State
147 Citation Style Properties
150 Customizing Citation Keys

Chapter 14 152 Collaborating in a Team
152 Overview of Citavi Team
153 Setting Up a Team Project
153 Protecting a Team Project
154 Managing Team Members
155 Assigning Roles
156 Changing Passwords
156 Refreshing Changes

Chapter 15 157 Customizing Citavi
157 Program Options
157 General
159 Folders
160 Search
161 OpenURL
161 Ordering
162 Scanner
163 Formatting
163 Color Coding Projects
164 Customizing the Overview Tab
164 Customizing the Reference Tab
164 Custom Fields
165 Customizing Quick Help
165 Adding Dictionaries
166 Using Settings Files
166 Exporting Settings Files
167 Importing Settings Files

Chapter 16 169 Useful Tips
169 Entering Text with a Scanner or Speech Recognition
169 Keyboard Shortcuts
177 Eliminating Duplicates

Contents

177 Maintaining Lists
178 More Special Characters
179 Applying Text Formatting
181 Spelling Checker
181 Inserting Tables
181 Inserting Formulas
182 Using Relative Paths
182 Magnifying Field Contents
182 Preparing Citavi for Presentations

Chapter 17 184 **Technical Information**
184 Installation
184 System Requirements
185 Installing on a Standalone Computer
185 Installing on a USB Flash Drive
186 Installing on a Mac
186 Installing on a Local Area Network
187 Installing on a Terminal Server
187 Installing on a Wide Area Network
187 Defining Administrative Settings
188 Deploying with a Software Distribution System
189 Reasons for Access Restrictions
190 Citavi Folder Structure
190 About Saving
190 Images in Citavi Projects
191 Citavi Transformers
191 Troubleshooting Internet Connection Problems
191 Additional Privacy Information

1. Introduction

In developing Citavi, it was our ambition that you would rarely need to refer to this manual. The Quick Help pane on the right-hand side of Citavi provides guidance for almost every feature and control. Quick Help texts also point out useful hints and additional features.

If you run into trouble, we have an array of support options. On our website, start with the Frequently Asked Questions and forums. Citavi Pro, Team, and Reader users can also contact us directly with questions. (And of course, we welcome feature requests from anyone.) Visit www.citavi.com/support to get started.

Enjoy working with Citavi!

2. Getting Started

This chapter gives you a brief introduction to working with Citavi. You will learn about:

- Installing Citavi
- Basic features of Citavi
- Starting a new project

2.1 Installing Citavi and Checking for Updates

This section covers:

- Installing Citavi
- Entering a License Key
- Updating Citavi
- Moving to a New Computer
- Uninstalling Citavi

2.1.1 Installing Citavi

The Citavi Setup is available on our website at **www.citavi.com/download**. You can install Citavi onto your computer or onto a USB flash drive (or other external drive). To install Citavi, you must have administrator rights. If you work on a managed network, contact your system administrator.

You can choose to install Citavi Pickers as well:

- Picker for Firefox (version 4 or later)
- Picker for Internet Explorer (version 8 or later)
- Picker for Adobe Acrobat (version 8 or later) and Adobe Reader (version 8 or later)

Installing Citavi on Your Computer

1. Ensure that your hard disk has enough free space.
2. Double-click **`CitaviSetup.exe`** to begin the Setup program.
3. The setup assistant takes you through the installation.
4. Wait until **Citavi was successfully installed** appears.
5. You can now delete the **`CitaviSetup.exe`** file or save it for installation on other computers.

2.1.2 Entering a License Key

After installation, Citavi initially runs as Citavi Free. This version allows you to create as many projects as you want, each limited to 100 references. Citavi Free has no other functional limitations and no expiration date.

If you need to store more than 100 references in a project, you will need Citavi Pro or Citavi Team. Purchasing a license key allows you to unlock your copy of Citavi Free into Citavi Pro or Citavi Team, and you can continue working with data that you have already entered into existing projects. Citavi license keys are available from the Citavi website and from resellers.

Exception: Site Licenses

Many educational institutions, companies, and organizations have purchased site licenses for their employees and students. As a member of a participating organization, you can request a free license key from the Citavi website. This license key will be valid for the duration of the organization's site license agreement. If your

organization renews its license agreement, we will email you the new license key. If your organization does not renew its license agreement, or if you leave the organization, you can purchase a personal license at the reduced upgrade price. This license will never expire. If your site license expires and you have not entered a new license key, Citavi will continue to work as Citavi Free and you will still be able to view and export all of your data.

Entering a License Key

1. Start Citavi.
2. On the welcome screen, click **License**.
3. Click **Enter a license key.**
4. Read the license agreement and then click **Accept.**
5. Copy the contents of the license key e-mail Clipboard (press **Ctrl+A** to select all, then press **Ctrl+C**), and then in Citavi, click **OK**.
6. Enjoy working with Citavi Pro or Citavi Team!

2.1.3 Updating Citavi

Citavi automatically checks for updates every time it is launched, as long as there is an active internet connection. If an update is available, Citavi will offer to download and install it. You will need to exit and restart Citavi for changes to take effect.

2.1.4 Moving to a New Computer

To use Citavi on a new computer, follow these steps:

Save Your Data on the Old Computer

As a default, all of your personal Citavi files, including your projects and any citation styles you may have created, are stored in the **Citavi 3** folder inside **Documents** (**My Documents** on Windows XP). Copy the entire **Citavi 3** folder to an external drive (e.g. a USB flash drive or a network share). Note: If you burn the folder to a CD and then copy it back, the files will be read-only. To use the files, you must make the files writable. To do this, right-click a file, click **Properties**, and then clear the **Read-only** checkbox.

Install Citavi on the New Computer

1. Download the latest version of Citavi from our website: www.citavi.com/download.
2. Double-click **CitaviSetup.exe** and complete the installation.
3. Copy the files you saved onto the new computer. Move the **Citavi 3** folder into **Documents** (or **My Documents**). You can overwrite the existing Citavi folder with the one from your disk.
4. Start Citavi. If you have a license key, open a project, and then on the **Help** menu, click **License**.

2.1.5 Uninstalling Citavi

Use the Windows **Control Panel** to uninstall Citavi.

Uninstalling Citavi under Windows 7 and Windows Vista

1. On the taskbar, click **Start**.
2. Click **Control Panel**.
3. Click **Programs**.
4. Click **Uninstall a program**.
5. Select **Citavi** from the list of installed software.
6. Click **Uninstall**.
7. If the User Account Control dialog appears, click **Continue**.
8. Click **Yes** to confirm that you want to uninstall Citavi.

Uninstalling Citavi under Windows XP

1. On the taskbar, click **Start**.
2. Select **Control Panel**.
3. Open **Add or Remove Programs**.
4. Select **Citavi** from the list of installed software.
5. Click **Change/Remove**.
6. Click **Yes** to confirm that you want to uninstall Citavi.

2.2 A Tour of Citavi

Before you start working with Citavi, we recommend you familiarize yourself with the following:

- Key terms and concepts
- Main elements of the user interface
- Reference Editor
- Knowledge Organizer
- Task Planner
- Preview
- Getting Help

2.2.1 Key Terms and Concepts

When working with Citavi, you will frequently encounter the following terms:

Project

A collection of references, quotations, thoughts and tasks that are necessary to achieve your research project goals. It is comparable to a file or database in other programs.

Reference

A single work. When you add a journal article or a book to your project, you are adding a new reference.

Reference Type

The type of work, for example a collected work, newspaper article or audio book. Reference types are referred to as publication types in other contexts. Citavi provides a variety of templates to record the various reference types

and all the information essential to them.

Knowledge Item

A knowledge item is a quotation, summary, comment, or thought.

2.2.2 Navigating Citavi

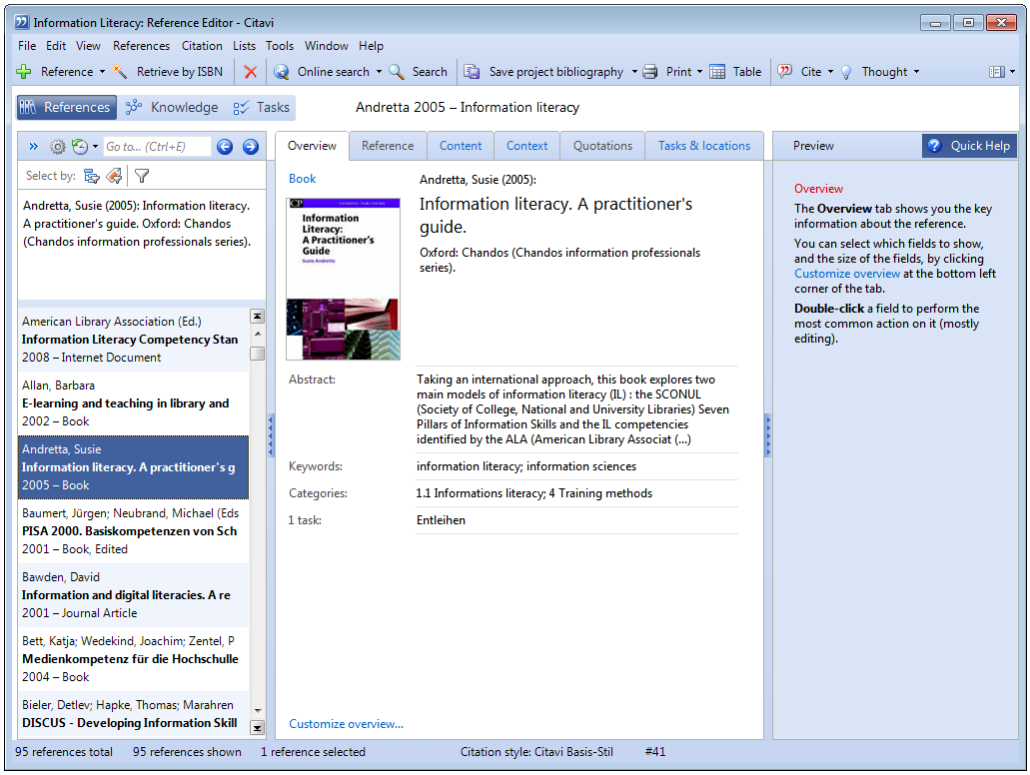
Citavi has three workspaces: the **Reference Editor**, the **Knowledge Organizer**, and the **Task Planner**.

The Citavi window is divided into three panes:

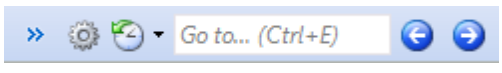
The **navigation pane** on the left.

The **editing pane** in the middle.

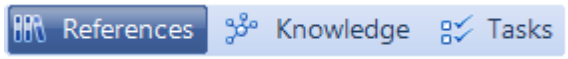
The **preview pane** or **Quick Help** on the right.


Information Literacy: Reference Editor - Citavi
File Edit View References Citation Lists Tools Window Help
Reference
Retrieve by ISBN
Online search
Search
Save project bibliography
Print
Table
Cite
Thought
References
Knowledge
Tasks
Andretta 2005 – Information literacy
Go to... (Ctrl+E)
Select by:
Andretta, Susie (2005): Information literacy. A practitioner's guide. Oxford: Chandos (Chandos information professionals series).
American Library Association (Ed.)
Information Literacy Competency Stan
2008 – Internet Document
Allan, Barbara
E-learning and teaching in library and
2002 – Book
Andretta, Susie
Information literacy. A practitioner's g
2005 – Book
Baumert, Jürgen; Neubrand, Michael (Eds
PISA 2000. Basiskompetenzen von Sch
2001 – Book, Edited
Bawden, David
Information and digital literacies. A re
2001 – Journal Article
Bett, Katja; Wedekind, Joachim; Zentel, P
Medienkompetenz für die Hochschulle
2004 – Book
Bieler, Detlev; Hapke, Thomas; Marahren
DISCUS - Developing Information Skill
Overview
Reference
Content
Context
Quotations
Tasks & locations
Book
Andretta, Susie (2005):
Information literacy. A practitioner's guide.
Oxford: Chandos (Chandos information professionals series).
Abstract:
Taking an international approach, this book explores two main models of information literacy (IL) : the SCONUL (Society of College, National and University Libraries) Seven Pillars of Information Skills and the IL competencies identified by the ALA (American Library Associat (...)
Keywords:
information literacy; information sciences
Categories:
1.1 Informations literacy; 4 Training methods
1 task:
Entleihen
Customize overview...
Preview
Quick Help
Overview
The Overview tab shows you the key information about the reference.
You can select which fields to show, and the size of the fields, by clicking Customize overview at the bottom left corner of the tab.
Double-click a field to perform the most common action on it (mostly editing).
95 references total
95 references shown
1 reference selected
Citation style: Citavi Basis-Stil
#41

To switch between references, click the arrows at the top of the navigation pane.



To switch between workspaces, click the workspace buttons at the top of the navigation pane.

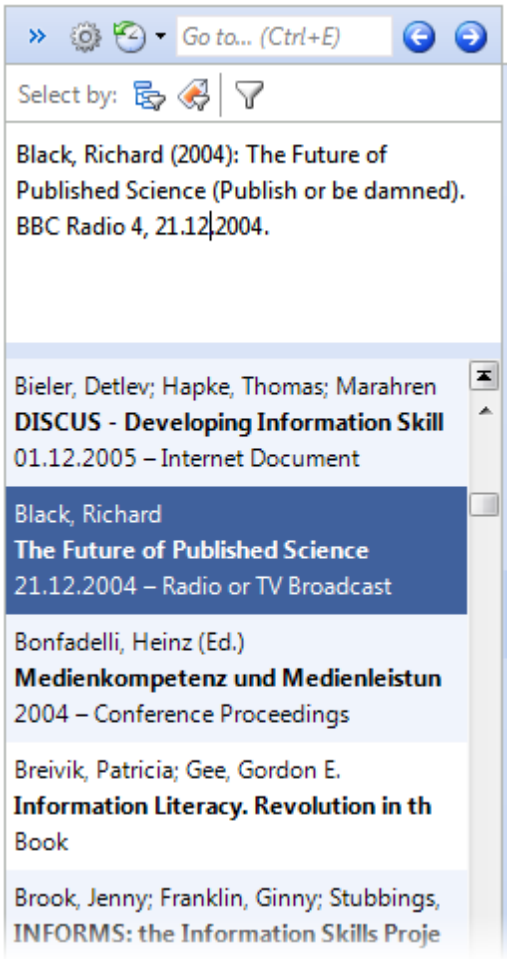


You can even customize the workspace layout to best suit your project needs. To do so, click the **Change workspace layout** button located on the far right side of the toolbar.

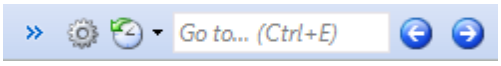
2.2.3 The Reference Editor

The **Reference Editor** is where you add and manage references for your project.

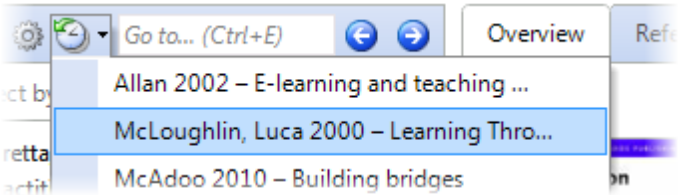
In the **navigation pane** you can view your list of references:


Go to... (Ctrl+E)
Select by:
Black, Richard (2004): The Future of Published Science (Publish or be damned). BBC Radio 4, 21.12.2004.
Bieler, Detlev; Hapke, Thomas; Marahren
DISCUS - Developing Information Skill
01.12.2005 – Internet Document
Black, Richard
The Future of Published Science
21.12.2004 – Radio or TV Broadcast
Bonfadelli, Heinz (Ed.)
Medienkompetenz und Medienleistun
2004 – Conference Proceedings
Breivik, Patricia; Gee, Gordon E.
Information Literacy. Revolution in th
Book
Brook, Jenny; Franklin, Ginny; Stubbings,
INFORMS: the Information Skills Proje

To switch between references, click the blue arrows:

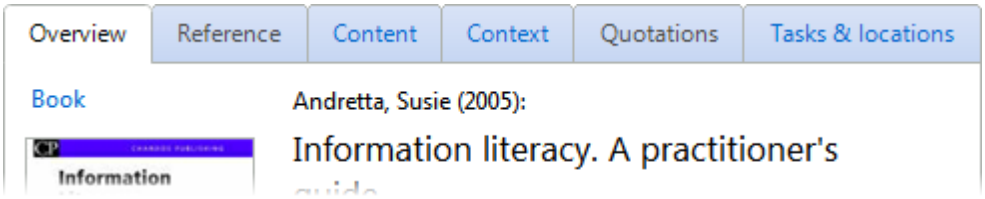


Citavi makes a note of which references you have viewed and saves this information. To view a reference you looked at previously, click the **Back** button:


Go to... (Ctrl+E)
Overview
Allan 2002 – E-learning and teaching ...
McLoughlin, Luca 2000 – Learning Thro...
McAdoo 2010 – Building bridges

To quickly open a reference for editing, begin typing the title in the **Go to** box.You can also browse by keyword or category by clicking **Show Categories** in the **navigation pane**.

Each reference is edited on six tabs:

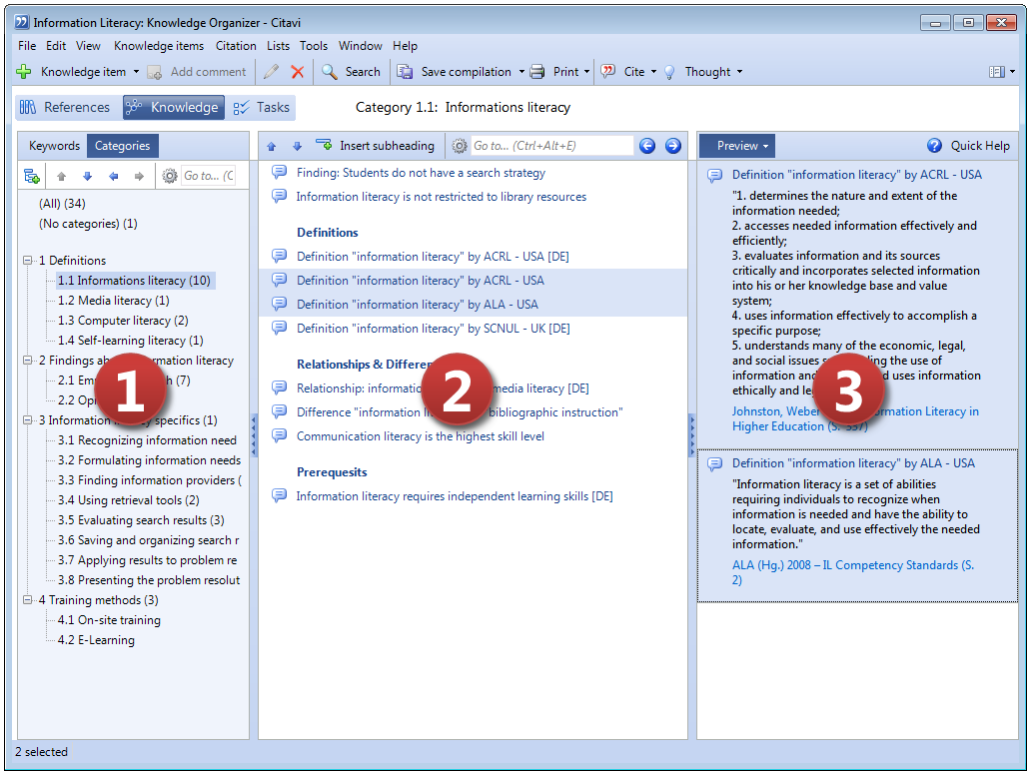


- **Overview** with the fields you select
- **Reference** for bibliographic information
- **Content** for describing content-related aspects of the reference
- **Context** for keywords, categories, and links to other references
- **Quotations** for passages you have quoted
- **Tasks & locations** for organizing your work and locating references

The fields on each tab give you a structured way of entering pertinent information for each reference. Use the **Overview** tab to assemble a personalized view with just the information you use most often. **Quick Help** gives you guidance for entering information in certain fields.

2.2.4 The Knowledge Organizer

The **Knowledge Organizer** helps you structure information and ideas related to your project.


Information Literacy: Knowledge Organizer - Citavi
File Edit View Knowledge items Citation Lists Tools Window Help
Knowledge item
Add comment
Search
Save compilation
Print
Cite
Thought
References
Knowledge
Tasks
Category 1.1: Informations literacy
Keywords
Categories
Insert subheading
Preview
Quick Help
(All) (34)
(No categories) (1)
1 Definitions
1.1 Informations literacy (10)
1.2 Media literacy (1)
1.3 Computer literacy (2)
1.4 Self-learning literacy (1)
3.1 Recognizing information need
3.2 Formulating information needs
3.3 Finding information providers (
3.4 Using retrieval tools (2)
3.5 Evaluating search results (3)
3.6 Saving and organizing search r
3.7 Applying results to problem re
3.8 Presenting the problem resolut
4 Training methods (3)
4.1 On-site training
4.2 E-Learning
Finding: Students do not have a search strategy
Information literacy is not restricted to library resources
Definitions
Definition "information literacy" by ACRL - USA [DE]
Definition "information literacy" by ACRL - USA
Definition "information literacy" by ALA - USA
Definition "information literacy" by SCNUL - UK [DE]
Relationships & Differe
Communication literacy is the highest skill level
Prerequesits
Information literacy requires independent learning skills [DE]
Definition "information literacy" by ACRL - USA
"1. determines the nature and extent of the information needed;
2. accesses needed information effectively and efficiently;
3. evaluates information and its sources critically and incorporates selected information into his or her knowledge base and value system;
4. uses information effectively to accomplish a specific purpose;
5. understands many of the economic, legal, and social issues
Definition "information literacy" by ALA - USA
"Information literacy is a set of abilities requiring individuals to recognize when information is needed and have the ability to locate, evaluate, and use effectively the needed information."
ALA (Hg.) 2008 – IL Competency Standards (S. 2)
2 selected
1
2
3

(1) You can set up categories to organize your work. For example, you could create an outline for your term paper or the table of contents for your dissertation. You could even develop a category system to reflect a library classification system.

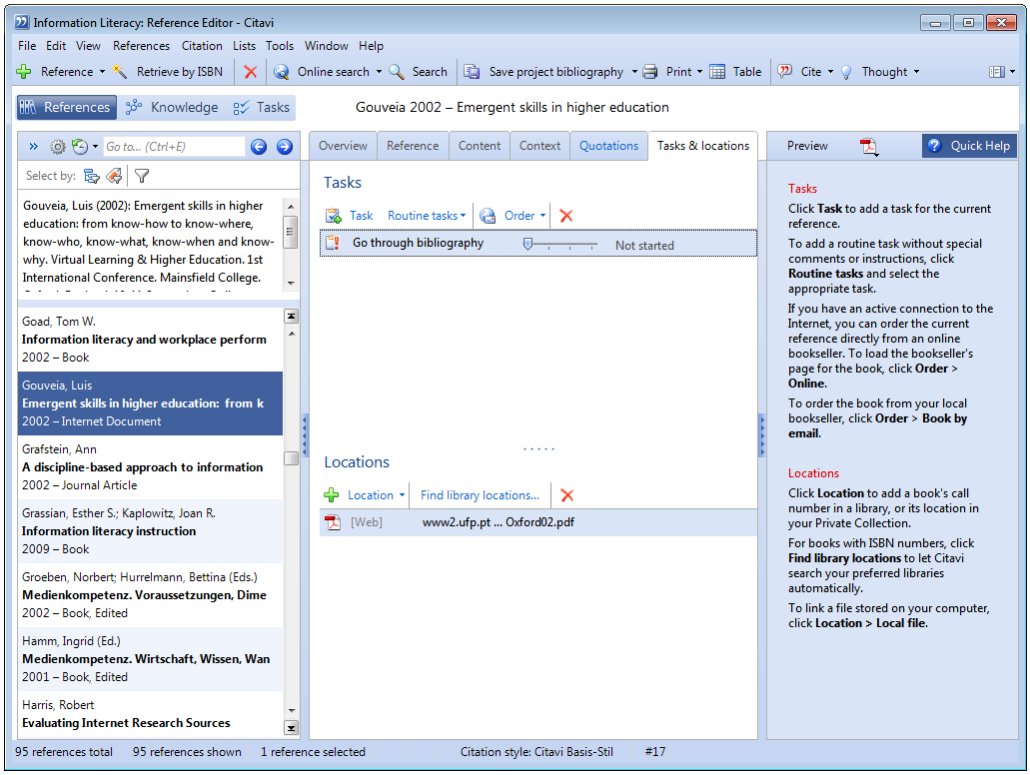
(2) The middle pane shows you the core statements of quotations and thoughts in the project. You can insert subheadings here as well to better organize your work.

(3) The right-hand pane shows you the full text of selected knowledge items

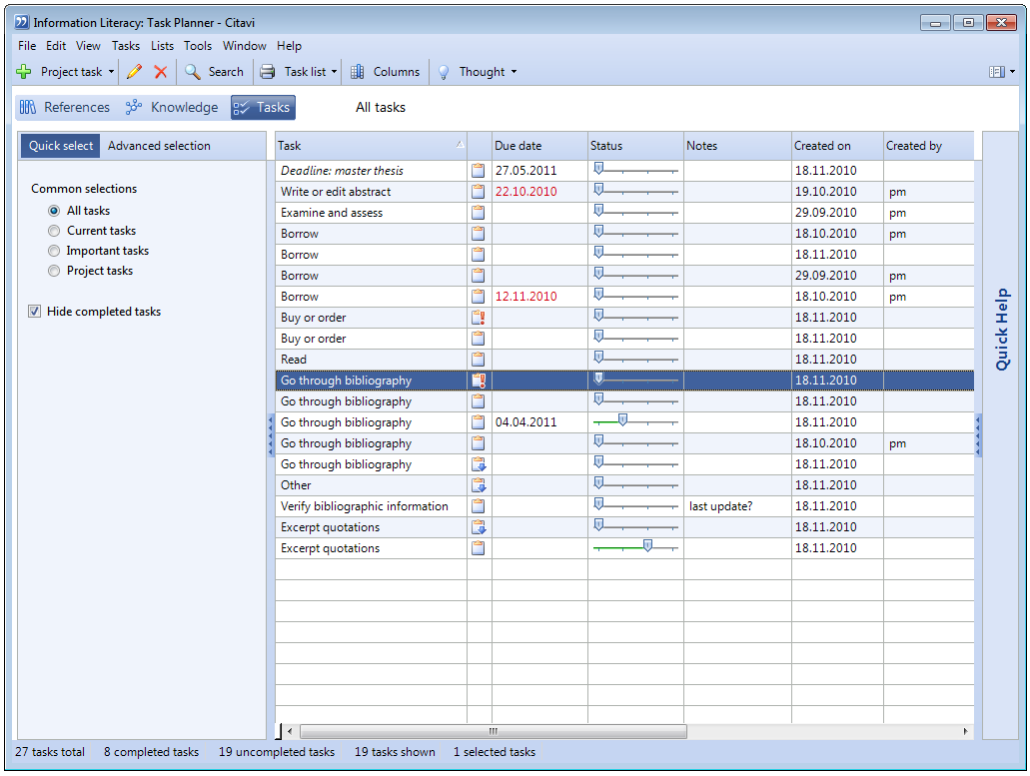
2.2.5 The Task Planner

Research involves a number of tasks: you need to double check your references, borrow books, make copies, and more. Use the **Task Planner** to keep track of tasks which still need to be done or have already been completed.

In the **Reference Editor**, on the **Tasks & locations** tab, you can add tasks to the current reference:

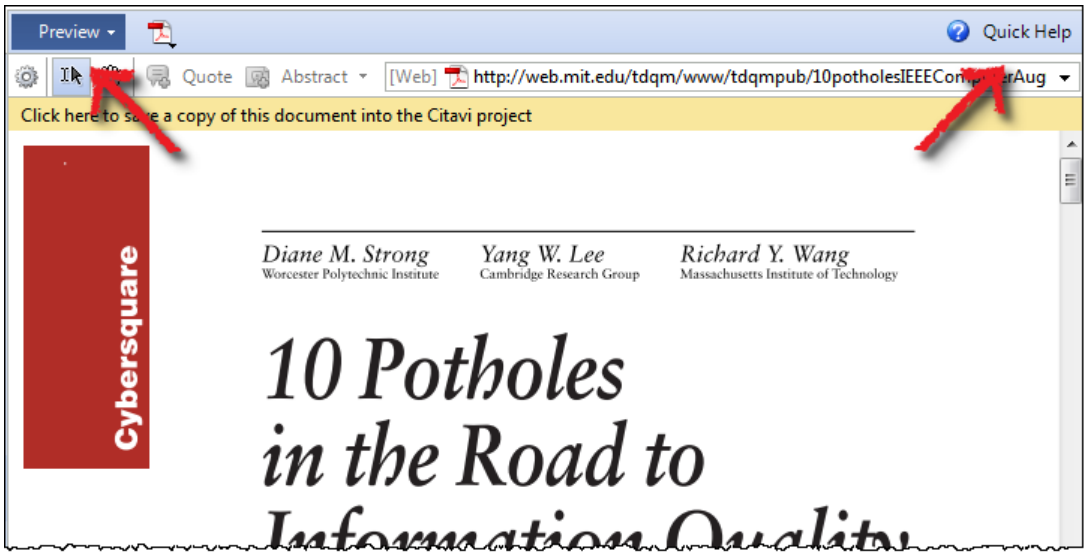

Information Literacy: Reference Editor - Citavi
File Edit View References Citation Lists Tools Window Help
Reference Retrieve by ISBN Online search Search Save project bibliography Print Table Cite Thought
References Knowledge Tasks
Gouveia 2002 – Emergent skills in higher education
Go to... (Ctrl+E)
Select by:
Gouveia, Luis (2002): Emergent skills in higher education: from know-how to know-where, know-who, know-what, know-when and know-why. Virtual Learning & Higher Education. 1st International Conference. Mainsfield College.
Goad, Tom W.
Information literacy and workplace perform
2002 – Book
Gouveia, Luis
Emergent skills in higher education: from k
2002 – Internet Document
Grafstein, Ann
A discipline-based approach to information
2002 – Journal Article
Grassian, Esther S.; Kaplowitz, Joan R.
Information literacy instruction
2009 – Book
Groeben, Norbert; Hurrelmann, Bettina (Eds.)
Medienkompetenz. Voraussetzungen, Dime
2002 – Book, Edited
Hamm, Ingrid (Ed.)
Medienkompetenz. Wirtschaft, Wissen, Wan
2001 – Book, Edited
Harris, Robert
Evaluating Internet Research Sources
Overview Reference Content Context Quotations Tasks & locations
Preview Quick Help
Tasks
Task Routine tasks Order
Go through bibliography Not started
Locations
Location Find library locations...
[Web] www2.ufp.pt ... Oxford02.pdf
Tasks
Click Task to add a task for the current reference.
To add a routine task without special comments or instructions, click Routine tasks and select the appropriate task.
If you have an active connection to the Internet, you can order the current reference directly from an online bookseller. To load the bookseller's page for the book, click Order > Online.
To order the book from your local bookseller, click Order > Book by email.
Locations
Click Location to add a book's call number in a library, or its location in your Private Collection.
For books with ISBN numbers, click Find library locations to let Citavi search your preferred libraries automatically.
To link a file stored on your computer, click Location > Local file.
95 references total 95 references shown 1 reference selected Citation style: Citavi Basis-Stil #17

When you switch to the **Task Planner**, you see all tasks in the project.



2.2.6 Preview

The pane at the far right lets you switch between the **preview** and **Quick Help**:



The **preview** is a key tool in Citavi. You can use it to easily copy quotations, abstracts, and tables of contents from PDFs, HTML files, and other documents.

2.2.7 Getting Help

We offer multiple forms of support for Citavi:

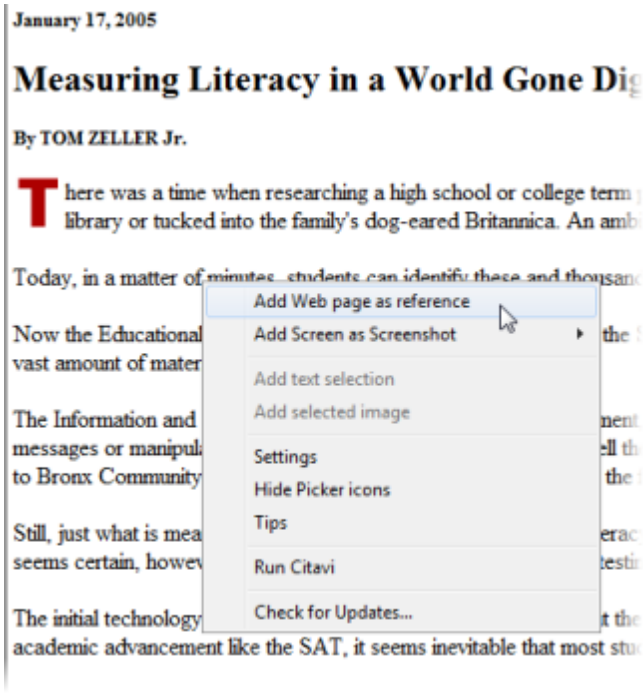
- **Quick Help** gives you guidance while you work and is located on the right, sharing a the same pane as the preview.

- The full **Citavi manual** can be opened on the **Help** menu (or by pressing **F1**).
- Additional support options are available at www.citavi.com/en/support.

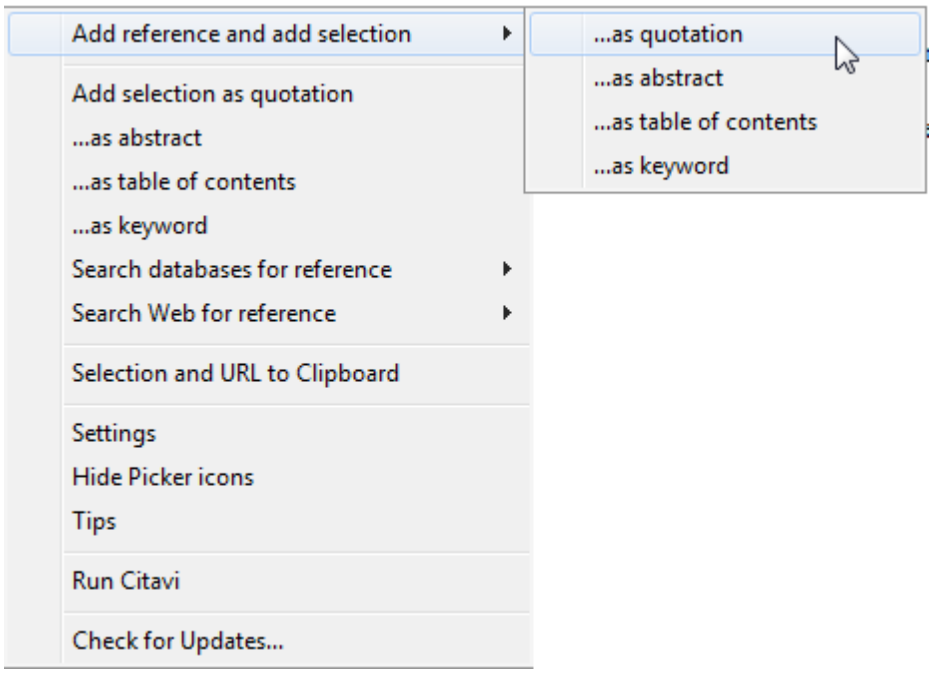
2.2.8 Citavi Pickers

Citavi pickers are free plug-ins that help you transfer information from Internet Explorer, Mozilla Firefox, or Adobe Reader or Adobe Acrobat into Citavi.

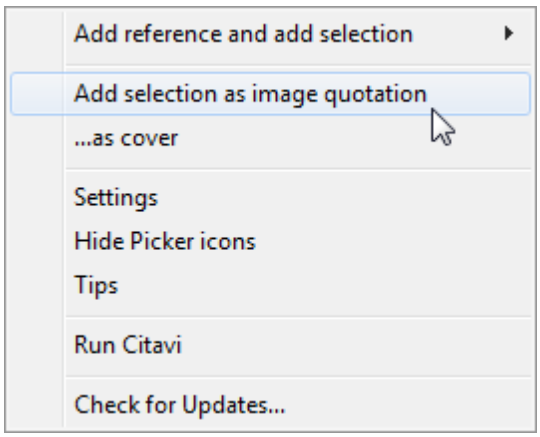
With just one click, import a Web page as a new reference into Citavi.



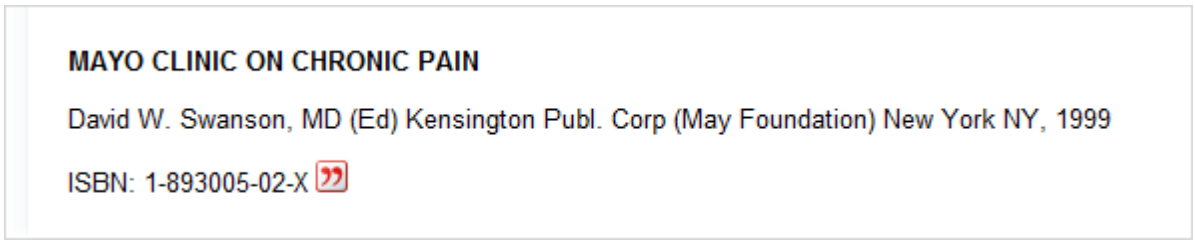
Highlight text on a Web page and save it as a quotation, abstract, or table of contents.



Copy images from Web pages as image quotations or covers.



Import books into your Citavi project by clicking the Picker icon that appears next to an ISBN or DOI name.



Quickly import results from online databases.

PMID: 21279993 [PubMed - in process]
Related citations
Body mass index and clinical response to infliximab in rheumatoid arthritis.
18. Klaasen R, Wijbrandts CA, Gerlag DM, Tak PP.
Arthritis Rheum. 2011 Feb;63(2):359-64. doi: 10.1002/art.30136 .
PMID: 21279992 [PubMed - in process]
Related citations
Citavi found 20 references to import directly. Click here to import the references.
javascript:showHunterMenu();

2.3 Starting a New Project

Citavi works with projects. This chapter covers:

- Setting Up a New Project
- Adding a Reference
- Searching a Library Catalog
- Describing References
- Customizing Citavi
- Adding Tasks
- Searching in a Project
- Obtaining Sources
- Building Knowledge
- Creating Project Bibliographies
- Creating a Publication

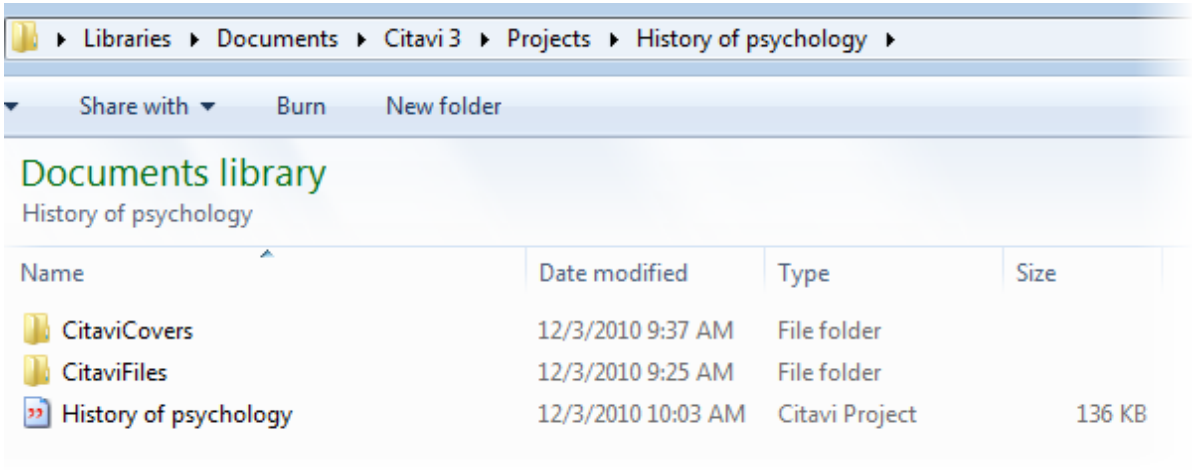
2.3.1 Setting Up a New Project

A Citavi project is where you store all the information pertaining to a particular topic. You can create as many Citavi projects as you need, each of which can include as many references as you like. Please note that if you are using **Citavi Free**, you cannot save changes if there are more than 100 references in all currently open projects.

Creating a New Project

1. In the **Reference Editor**, on the **File** menu, click **New project**.
2. Choose where you want to save the project. By default, Citavi saves projects in Documents or My Documents in the **Citavi 3\Projects** folder.
3. Enter a file name, for example The History of Psychology, and click **OK**.
4. Citavi creates a new folder with the name of the project, containing the project file (**The History of Psychology.ctv3**) and opens the project. Now you can begin adding references or performing online searches.

Citavi creates a folder for each project with the name of the project. In addition to the project file, it contains two subfolders: **CitaviCovers** for any cover art in the project, and **CitaviFiles** for files linked to references in the project. These may include full-text articles in PDF format or scanned pages of a book.



If you want to enter a description of your project, on the **File** menu, click **Project properties**. On the **Project** tab, enter the description.

Deleting a Project

1. Exit Citavi.
2. Open the Citavi folder for user files (by default, Citavi saves projects in **Documents** or **My Documents** in the **Citavi 3\Projects** folder).
3. Delete the folder for the project by right-clicking the project name and clicking **Delete**.

Warning: Since the **CitaviFiles** subfolder is also deleted, any linked files will be moved to the Recycle Bin as well.

2.3.2 Adding a Reference

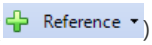
The fastest way to add a book to Citavi is by entering its ISBN (International Standard Book Number). The ISBN is a 10- or 13-digit number (spaces and hyphens don't matter).

Adding a Book by ISBN

1. In the **Reference Editor**, click **Retrieve by ISBN**on the toolbar.
2. Enter the ISBN, for example `978-3411042340` and click **Add**. Citavi searches for the book.
3. Click **Add to project**. The book is added and applied as a selection. You can now edit the reference, for example by applying keywords or writing an evaluation.
4. Click **Cancel selection** to show the remaining references in the project.

Many scholarly journal articles today have a unique identifier similar to the ISBN of a book: the Digital Object Identifier, typically called a DOI name. You can add journal articles by DOI name the same way you add books by ISBN. This also works for journal articles with a PubMed ID. Just follow the same steps and enter the DOI name or PubMed ID instead of an ISBN.

Adding a Reference by Hand

1. In the **Reference Editor**, click **Reference** (

) on the toolbar.
2. Select the appropriate reference type. Refer to the **Quick Help** texts for guidance. Click **OK**.
3. Enter the information, referring to the **Quick Help** as you go along.

2.3.3 Searching a Library Catalog

Citavi lets you search over 4,000 library catalogs and databases. To search a subscription database, your company or university must subscribe to it.

Searching a Library Catalog

1. In the **Reference Editor**, click **Online search**.
2. Select the checkbox for the library you want to search, for example **Library of Congress**.
3. Type the search words into the **All fields** box, for example `information literacy instruction`.
4. Click **Search**.
5. Once the search results have been imported from the library, click **Add to project**. The results are applied as a selection.
6. Examine the results and edit them if necessary. Click **Cancel selection** when you are finished to show all the references in the project.

2.3.4 Describing References

You can use keywords and categories to organize and describe references.

Use **keywords** to describe the *content* of a work. Keywords help you group references in your project and recall the main topics of a work more easily. When you search catalogs and databases online with Citavi, you can import any keywords that may already be present.

Use **categories** to place a reference into the appropriate *context* for your project. Categories help you to divide your collected references into hierarchical, manageable units. You can assign one or more categories to a reference.

In the **Knowledge Organizer**, you can use the navigation pane to browse your references by keyword or category.

Applying Keywords

1. In the **Reference Editor**, switch to the **Context** tab.
2. Enter keywords into the Keywords field. A keyword can be a single word or a phrase consisting of several words. Separate keywords with semicolons, for example `Bachelor's degree; Bologna Process; Education reform`.

Creating Categories

1. In the **Reference Editor**, switch to the **Context** tab.
2. Click **Categories**.
3. Click **New category** and enter the name of the category.
4. Click **New category** again to add another category at the same level, or click **Subcategory** to create a more specific category. For example, you might create `Medication` as a subcategory of `Treatment Methods.`

Assigning Categories

1. In the **Reference Editor**, switch to the **Context** tab.
2. Click **Categories**.
3. Select the checkboxes for the categories you want to assign to the reference and then click **OK**.

2.3.5 Setting Up Citavi

Citavi offers many customizable options.

Selecting Catalogs

When you first start Citavi, several catalogs are already selected for online search. You can easily add more, for example, the catalog of your university library.

To add another catalog or database for online search, in the **Reference Editor**, click **Online search** and then click **Add database or catalog**.

To add catalogs for ISBN searches, on the **Tools** menu, click **Options.** On the **Search** tab, on the **ISBN download** tab, click **Add database or catalog**.

To find out whether a book is available at your library and where it is located, add your library catalog to Citavi's location search. On the **Tools** menu, click **Options.** On the **Search** tab, switch to the **Location search** tab and click **Add database or catalog**.

Customizing the Overview

You can decide which bibliographic information is most important to you and include just those fields on the Overview tab. In the **Reference Editor**, on the **Overview** tab, click **Customize overview** and select the checkboxes for the fields you want to appear.

Choosing Project Colors

If you work with multiple projects, you may find it handy to give each one a different color so you can tell them apart at a glance. On the **Tools** menu, point to **Project color** and click a color.

Using Citavi with TeX

If you use TeX to create publications, you can use Citavi with your TeX editor. To start, on the **Tools** menu, click **Options**. Then click **General** and select the **TeX support** checkbox. Click **Customize** to change the rules that Citavi uses to create BibTeX Keys.

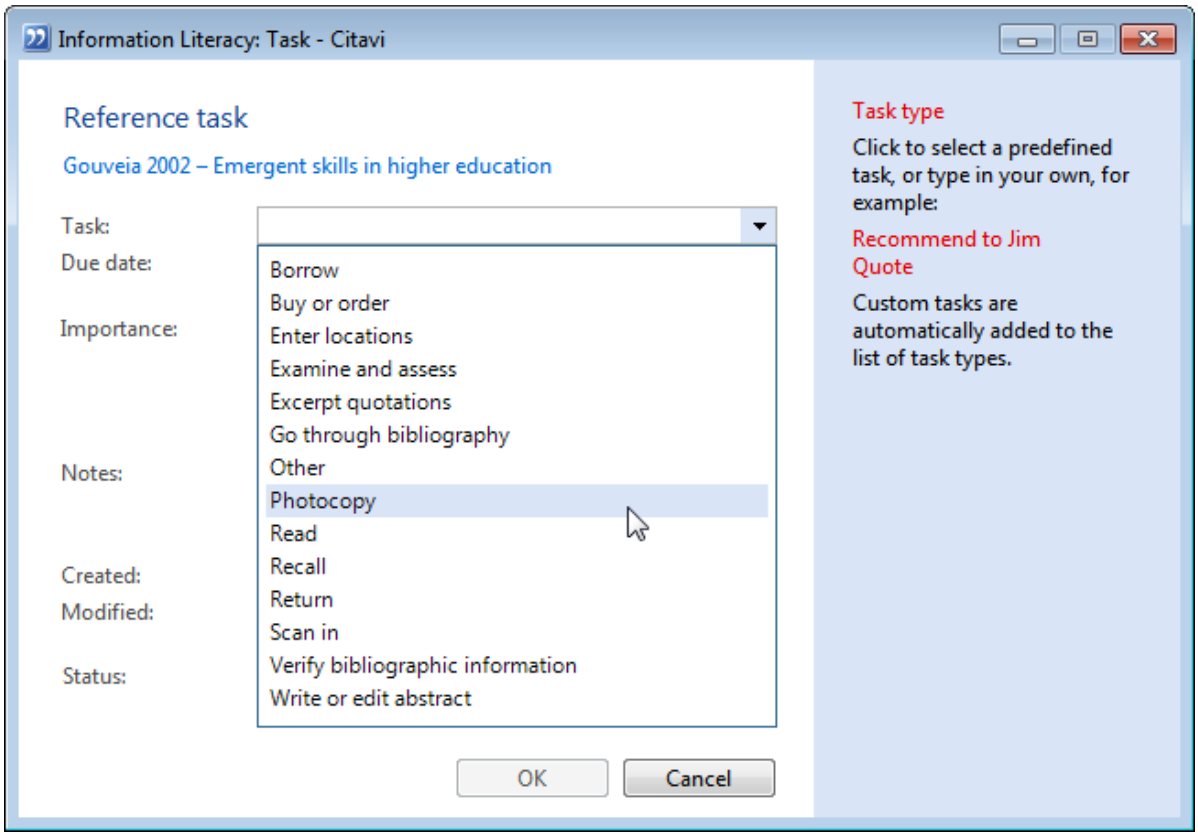
2.3.6 Adding Tasks

Research involves a number of tasks: you need to double check your references, borrow books, make copies, and more. To keep track of it all and help you work more efficiently, Citavi offers the **Task Planner**.

The **Task Planner** shows you all tasks in the project.

Adding a Task to a Reference

1. In the **Reference Editor**, switch to the **Tasks & locations** tab.
2. Click **Tasks** and select a predefined task or type in your own.



2.3.7 Searching in a Project

You can quickly switch to a reference using the **Go to** feature. To find other text or items in your project, use **Search**.

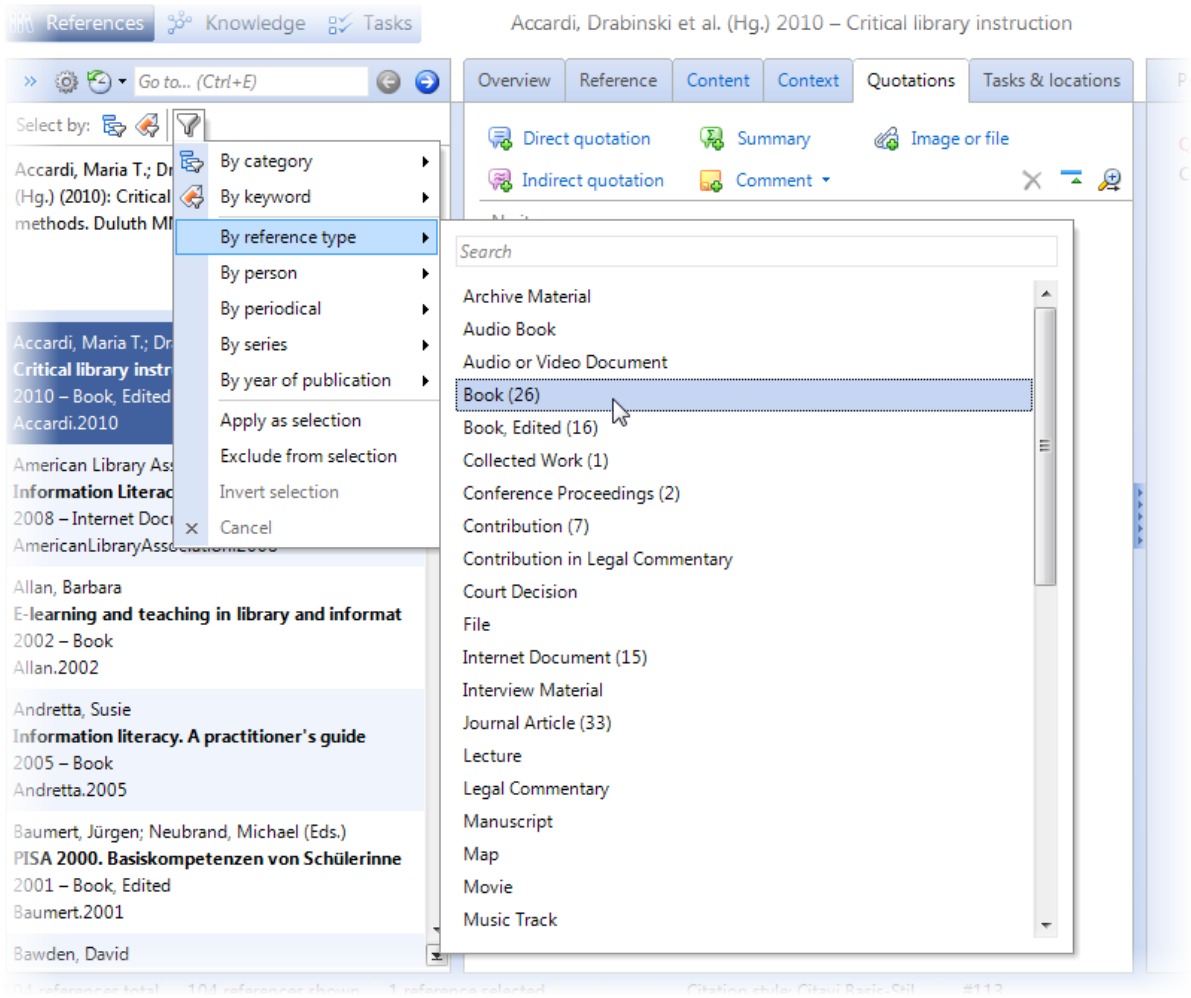
Switching Directly to a Reference

1. In the **Reference Editor**, click in the **Go to** box (or press **Ctrl+E**).
2. As you type the search term, Citavi shows the results.
3. Double-click the reference you want to view.

Finding References, Quotations, and Thoughts in Your Project

1. In the toolbar, click **Search**.
2. Enter the terms you want to find and click **Search**.
3. Double-click a search result to switch to it.

You can also use the selection button to find references in your project that match specific criteria:



2.3.8 Obtaining Sources

After performing online searches, you will want to actually obtain and work with the books and articles you have found. From Citavi you can download the full-text articles from the Internet (if available), order books from online booksellers, and request interlibrary loan items from your university library.

Finding Full Texts

1. In the **Reference Editor**, on the **References** menu, click **Check availability and find full text.** Then click **Find full text.**
2. Select the references you want to find the full text for, then click **Find full text**.
3. Citavi searches several online resources. If full text is found, a link is added to the reference.

Hint: If you only have a dozen or so references, you may want to select the **Download full text** checkbox. If you have several hundred references, it is better to download PDFs individually. In this case, Citavi will add a link to the full text for each individual reference.

Checking Availability at Your Library

Many university libraries offer a service (called an *OpenURL link resolver*) which Citavi can use to check whether an article is available through the library. The link resolver will take you to a Web page showing the available options, such as a link to a full text or the item's library catalog entry.

1. In the **Reference Editor**, on the **References** menu, point to **Check availability and find full text**, and then click **Check availability with OpenURL**.

2. Citavi passes the reference's information to the link resolver, which then shows you the available options.

To select your library's link resolver, on the **Tools** menu, click **Options.** On the **OpenURL** tab, click **Base URL**. If your library does not appear in the list shown, ask your library for the address and enter it by hand.

Ordering a Book Online

1. In the **Reference Editor**, make sure the book has an ISBN number.
2. On the **Tasks & locations** tab, click **Order**, and then click **Online**.
3. Citavi searches the selected booksellers and opens the order page, where you can complete the order.

To select the booksellers to search, on the **Tools** menu, click **Options**. On the **Ordering** tab, click **Online booksellers**.

2.3.9 Building Knowledge

You can use Citavi to more easily interpret and apply the contents of your sources. You can write an abstract for a reference, document the relationships between references, create quotations, and quickly record your thoughts and ideas.

Writing an Abstract

Writing an abstract helps you summarize the questions, methodology, key results, and implications of a work and can be a useful way to draw connections to your own project.

- In the **Reference Editor**, on the **Content** tab, enter the abstract in the **Abstract** field.
- To use an enhanced editor with formatting and a spelling checker, click **Abstract**.

Creating Links

Citavi lets you link related references. For example: Does author A refute the claims of author B? Which authors does author C cite?

1. In the **Reference Editor**, switch to the **Context** tab.
2. To add links to other references that the current reference cites, under **This reference links to**, click **New link** ( ).
3. To add links to other references that cite the current reference, under **This reference is linked from**, click **New link** ( ).
4. You can also specify the **Type of link** and enter explanations or comments in the **Notes** field. For example, if author A disproves author B's claims, you could set the link as negative and then include a short description of author A's discussion of author B.

Quoting

During your research, you will find passages you want to quote in your work. You can save these quotations in Citavi for later use.

1. In the **Reference Editor**, switch to the **Quotations** tab.
2. Select the appropriate type of quotation:
   - **Direct quotation** for a passage copied verbatim from another source.
   - **Indirect quotation** for the author's thoughts in your own words.
   - **Summary** for a heavily condensed version of the original text in your own words.
   - **Image or file quotation** for images or multimedia files.
   - **Comment** for your thoughts on the text.
3. Enter the **Page range** and the **Text** of the quotation.
4. Summarize the quotation's main idea as a **Core statement**.
5. Apply **Keywords**.
6. Click to assign **Categories**.

7. Click **OK** to finish.

Saving Thoughts

During your research, ideas will come to mind that you don't want to forget. Citavi lets you save thoughts, too.

1. In the toolbar, click **Thought**.
2. Enter the thought.
3. Apply **Keywords**.
4. Summarize the main idea of your though as a **Core statement**.
5. Click **OK** to finish.

2.3.10 Creating Project Bibliographies

In Citavi, a **Project Bibliography** is a list of references created independently of a paper you are writing — it includes all references in your project, regardless of whether or not they might be used in your research project. A project bibliography can also include additional information beyond that required by the selected citation style.

To create a bibliography for a paper automatically based on a selected citation style, see Creating a Publication.

Creating a Project Bibliography

1. In the **Reference Editor**, click **Save project bibliography**.
2. Choose a location and the desired file type, for example **Word Document**.
3. Click **Save**

2.3.11 Creating a Publication

Using the **Publication Assistant** in Citavi, you can easily insert quotations, citations, and thoughts from your project into your manuscript.

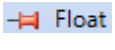
Initially, Citavi inserts **placeholders** instead of formatted citations — for example, `{Smith 2010 #123: 33}`. During the final step, Citavi replaces these placeholders with formatted citations — for example, (Smith 2010, p. 33) — and inserts a **document bibliography**.

Selecting Your Word Processor

Before you start using the Publication Assistant, you must tell Citavi which word processor you use.

1. On the **Tools** menu, click **Options**.
2. On the **General** tab, under **Publication Assistant**, select your default word processor, for example, **Word**.
3. Select what you want the Publication Assistant to do when you double-click a reference.
4. Click **Apply**, and then click **OK**.

Inserting Quotations, Citations, and Thoughts with the Publication Assistant

1. Open the Citavi project you are using for your publication.
2. On the **Citation** menu, click **Publication Assistant** (or press **F7**) and then click 

to keep the Publication Assistant in front.
3. To insert a placeholder for a reference, select the **References** tab. To insert quotations and thoughts (with corresponding placeholders), select the **Knowledge items** tab.
4. In your word processor, place the insertion point where you want the citation, quotation, or thought to be inserted.
5. Double-click the reference, quotation, or thought in the Publication Assistant.

Formatting the Publication

When you format your publication, Citavi replaces the placeholders with formatted citations and inserts a

bibliography.

1. Close the document in your word processor.
2. In the **Reference Editor**, on the **Citation** menu, click **Format publication**, and then click **Choose documents**.
3. Select the document and click **Open**.
4. Citavi scans the manuscript for placeholders and shows you a preview of each citation, quotation or thought.
5. If necessary, select the citation style.
6. Click **Format.** Then click **Save**. Citavi saves the formatted publication *as a copy*.

Important: *Do not* make changes to the formatted publication because Citavi then cannot add any references to the bibliography. *Always* make changes to the unformatted manuscript, then format the publication again.

3. Adding References

The **Reference Editor** is a powerful and flexible tool that helps you record and manage information effectively. This chapter covers:

- Why and How We Cite
- Adding References Automatically
- Adding References Manually
- Four Examples of Adding a Reference

3.1 Why and How We Cite

Johannes Gutenberg's invention of the printing press with movable type in the second half of the 15th century led to printed materials (books, newspapers, pamphlets, etc.) becoming the central means of social communication. Until the end of the 20th century, these were also the dominant media for scholarly communication. Only the invention of the computer, which allows text to be written electronically and distributed on the Internet, fundamentally changed this. Today, electronically created and stored texts play a vital role.

Over time, print shops and publishing companies were founded to produce and distribute printed matter. To identify specific printed works, in addition to the name of the author and title, it was necessary to include the place of publication, the publisher, and the year of publication.

The printed word quickly became the preferred medium for recording and passing on knowledge. This trend was also accompanied by the social need to make printed materials readily available and accessible. The **library** became the established institution to meet this need. Today, national, local, university and institutional libraries exist to serve various users.

When writing, we cite in order to give credit to those whose ideas we build upon, and to allow others to verify our claims. These principles in turn require that works cited be handled according to certain rules. Every source referenced, be it directly or indirectly, must be given proper credit, which is done as a citation in the text together with a complete citation in a bibliography.

The basic form of a citation includes:

- Name of the author
- Title
- Place of publication
- Year of publication

Where applicable, this basic form is supplemented with additions such as a subtitle, edition, publisher, or series title, depending on the type of material being cited. Which additions appear in the bibliography depend on the citation style.

This produces the following template (additions in italics):

- Name of the author
- Title
- *Subtitle*
- *Volume number and title*
- *Edition*
- Place of publication
- *Publisher*
- Year of publication
- *Series title and number of volumes in the series*

The basic template varies by reference type. For example, in an edited book, the name of the editors appear instead of the names of the authors. Refer to the overview of reference types for help in choosing the correct reference type to use.

3.2 Adding References Automatically

In this chapter you will learn how to:

- Add a book by ISBN number
- Add multiple books by ISBN number
- Add references with a bar code scanner
- Add articles by DOI name or PubMed ID
- Import PDF files

3.2.1 Adding a Book by ISBN Number

The **International Standard Book Number** (ISBN) is an identifier for books and other standalone publications designed to simplify the ordering process in bookstores. Citavi can search multiple bookstores and library catalogs for this number in order to automatically retrieve the bibliographic information for a book.

Adding a Book or Other Work by ISBN Number

1. On the **References** menu, click **Retrieve by ISBN or other identifier**, or click **Retrieve by ISBN** in the toolbar.
2. Enter the ISBN number in the **Manual entry** field, and then click **Add**.
3. Citavi searches all of the selected catalogs. The bibliographic information is taken only from the first source that contains the reference. Make sure you have an active Internet connection.
4. Click **Add to project**.

If you consistently have no results, you may want to change the selected catalogs by following the steps below.

Selecting Catalogs for ISBN Downloads

1. On the **Tools** menu, click **Options**.
2. On the **Search** tab, click **ISBN download**, and then click **Add database or catalog**.
3. Use the search fields to find the catalog or database you want to use. Make sure you have an active Internet connection. Select the checkboxes next to the catalogs you want to add, then click **Add**.
4. Click the arrows to set the order that catalogs will be searched in.

Hint: If you selected **Book** as the reference type before performing an ISBN download, you should check whether the book is actually a book and not an edited book or conference proceedings. Citavi cannot always automatically determine the reference type from an ISBN download.

3.2.2 Adding Multiple Books by ISBN Number

If you have a list of books containing ISBN numbers, you can easily add all of the referenced books to Citavi, regardless of whether the list is a Web page, a text file or a spreadsheet. You can also use a bar code scanner to quickly compile a list of ISBN numbers.

Entering Multiple ISBN Numbers By Hand

1. On the **References** menu, click **Retrieve by ISBN or other identifier**, or click **Retrieve by ISBN** in the toolbar.

2. Enter the ISBN number in the **Manual entry** field, and then click **Add**. Repeat for each ISBN.
3. Citavi searches all of the selected catalogs. The bibliographic information is taken only from the first source that contains the reference. Make sure you have an active Internet connection.
4. Click **Add to project** to add all the references found to the current project.

If you consistently have no results, you may want to change the selected catalogs. Choose catalogs that are a better match (by subject or location) for your references, then run the search again.

Importing a List of ISBN Numbers from the Clipboard

1. Copy the list of ISBNs to the Clipboard.
2. On the **References** menu, click **Retrieve by ISBN or other identifier**, or click **Retrieve by ISBN** in the toolbar.
3. Click **Text from Clipboard**, then click **Paste from Clipboard**.
4. Citavi searches all of the selected catalogs. The bibliographic information is taken only from the first source that contains the reference. Make sure you have an active Internet connection.
5. Click **Add to project** to add all the references found to the current project.

Importing a List of ISBN Numbers from a Text File

1. On the **References** menu, click **Retrieve by ISBN or other identifier**, or click **Retrieve by ISBN** in the toolbar.
2. Select **Import file**.
3. Click **Choose file** and select the file containing the list of ISBN numbers. It must be in one of the following formats:
   - Microsoft Word (.doc or .docx)
   - OpenDocument Text, used primarily by OpenOffice.org Writer (.odt)
   - Rich Text Format (.rtf)
   - HTML (.htm or .html)
   - PDF (.pdf)
   - Plain text (.txt)
4. Citavi searches all of the selected catalogs. The bibliographic information is taken only from the first source that contains the reference. Make sure you have an active Internet connection.
5. Click **Add to project** to add all the references found to the current project.

3.2.3 Adding References with a Bar Code Scanner

If you have a sizeable personal library or if you often find interesting books in libraries or bookstores that you want to add to Citavi, you may want to consider investing in a bar code scanner. It can scan ISBN numbers with great accuracy, saving you time and frustration.

Citavi works with several types of scanners:

- Bar code scanners which connect directly to your computer and scan in real time. These scanners don't need drivers. Just plug one in and proceed as described in Adding Multiple Books by ISBN Number.
- Text scanning pens function similarly to bar code scanners but must first have driver software installed.
- Scanners with internal memory let you scan bar codes independently of a computer. When you get back to your computer, Citavi reads the contents of the scanner all at once. These scanners must have drivers installed and only models explicitly supported by Citavi can be used (Symbol-Motorola CS1504, Opticon OPN-2001, Scanndy, or SmartScanndy).

Importing a List of ISBN Numbers from a Bar Code Scanner with Internal Memory

1. Scan the ISBN numbers with your bar code scanner. The numbers are stored in the scanner.
2. Connect the scanner to your computer.

3. On the **References** menu, select **Retrieve by ISBN or other identifier**, or click **Retrieve by ISBN** in the toolbar.
4. Select **Bar code scanner memory**.
5. Click **Read scanner memory** and select your scanner. If no scanner is configured, on the **Tools** menu, click **Options**, and then click **Scanner** and select the correct model.
6. Citavi searches the selected catalogs for the ISBN numbers in the scanner. If you consistently have no results, you may want to change the selected catalogs. Choose catalogs that are a better match (by subject or location) for your references, and then run the search again.
7. Click **Add to project** to add all the references found to the current project.

3.2.4 Adding Articles by DOI or PubMed ID

You can download bibliographic information for articles as easily as you can for books with ISBNs. The only requirement is that the article have a DOI name or PubMed ID.

A **Digital Object Identifier** (DOI name) looks similar to a Web address, but unlike a Web address, it is a permanent locator. A DOI name can be used both to find a particular article and also to download its bibliographic information. You can identify a DOI name by its address: http://dx.**doi.org**/10.1016/j.lisr.2009.01.002 or **doi**:10.1016/j.nedt.2008.07.004

PubMed is the world's largest database of citations for biomedical and life science literature. Every article is assigned a **PubMed ID** (PMID). If you have an article with a PubMed ID, you can use it to download the article's bibliographic information with Citavi. You can identify a PubMed ID by its prefix: **PMID** 20439253

Adding an Article by DOI Name

1. On the **References** menu, select **Retrieve by ISBN or other identifier**, or click **Retrieve by ISBN** in the toolbar.
2. Enter the DOI name in the **Manual entry** field, for example, `10.1016/j.nedt.2008.07.004` (you can leave out the "doi" prefix), then click **Add**.
3. Citavi downloads the bibliographic information from crossref.org. Make sure you have an active Internet connection.
4. Click **Add to project**.

Adding an Article by PubMed ID

1. On the **References** menu, select **Retrieve by ISBN or other identifier**, or click **Retrieve by ISBN** in the toolbar.
2. Enter the PubMed ID in the **Manual entry** field, for example `20439253` (you can leave out the "PMID" prefix), then click **Add**.
3. Citavi downloads the bibliographic information from PubMed. Make sure you have an active Internet connection.
4. Click **Add to project**.

3.2.5 Importing PDF Files

You can import PDFs of scholarly articles directly into Citavi. For each PDF, Citavi creates a new reference and searches for its bibliographic information on www.crossref.org.

If the article is not available on Crossref, Citavi will try to extract the bibliographic information from the metadata in the PDF. Since metadata is often incomplete, you should always double-check the bibliographic information and make changes if necessary.

Importing a Single PDF

1. In the **Reference Editor**, on the **File** menu, click **Import**.
2. Select **PDF files** and click **Next**.
3. Select **Single file**, click **Browse** to select the file, and then click **Next**.
4. Citavi performs an online search for the bibliographic information.
5. Click **Add to project**.

Importing Multiple PDFs

1. In the **Reference Editor**, on the **File** menu, click **Import**.
2. Select **PDF files** and click **Next**.
3. Select **Folder of files**, select the **Include subfolders** option if applicable, click **Browse** to select the folder, and then click **Next**.
4. Clear the checkboxes of any PDFs you don't want to import.
5. Citavi performs an online search for the bibliographic information.
6. Click **Add to project**.

Citavi saves copies of the imported PDFs in the **`CitaviFiles`** subfolder inside the project folder, normally **`Documents\Citavi 3\`*`project name`*`\CitaviFiles`**.

3.3 Adding References Manually

In this chapter you will learn how to:

- Add a new reference by hand
- Set favorite reference types
- Choose the correct reference type
- Change reference types
- Use Short Titles, Citations, and Citation Keys
- Duplicate a Reference

3.3.1 Adding a New Reference by Hand

Citavi makes it simple to add references by providing templates for many different reference types. Each template only contains those fields required for the bibliographic description of that particular reference type. When you add a new reference, you begin by choosing the reference type.

Adding a New Reference by Hand

1. Switch to the **Reference Editor**, if necessary.
2. On the **References** menu, click **New reference by hand**, press **Ctrl+N**, or click **Reference** on the toolbar.
3. Choose the appropriate reference type from the list and click **OK**.
4. Enter bibliographic information on the **Reference** tab.

Hint: New projects open with a blank reference for a journal article. If necessary, on the **Reference** tab, click the name of the reference type to change it or to delete it and add a new reference.

Saving Time with Autocomplete

In many fields (author, editor, keywords, etc.), Citavi will automatically complete what you are typing, based on

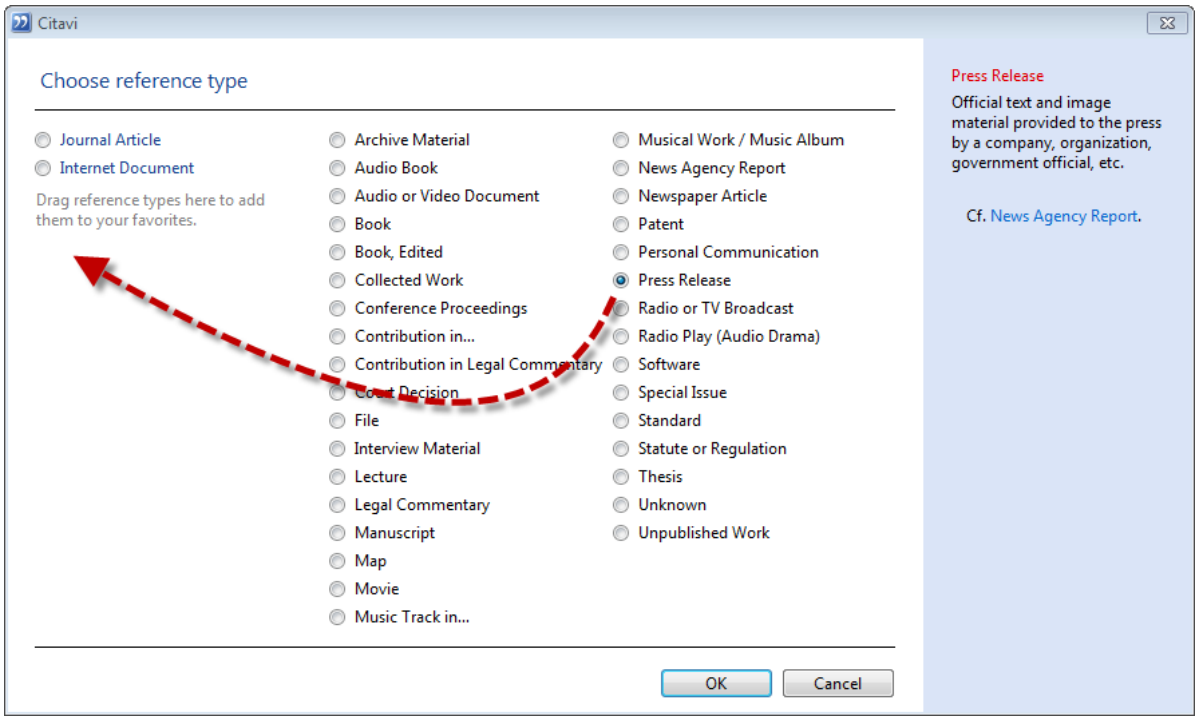
phrases or names used in other references in the project. To accept a suggestion, press **Tab** or **Enter**. To reject the suggested completion, continue typing the new word or name or press **Esc**.

3.3.2 Setting Favorite Reference Types

Citavi offers 35 different reference types. In your everyday work, you will only use a few regularly. You can set these as favorites for easy access.

Setting Your Favorite Reference Types

1. In the **Reference Editor**, on the toolbar, click **Reference**.
2. Drag reference types to the left to add them as favorites; drag them to the right to remove them.



3.3.3 Reference Types in Citavi

The following list shows you the reference types Citavi provides specific templates for.

There are three kinds of reference types in Citavi: independent, parent and child publications.

Independent references are just that: they are not related to any other reference in the project.

Some items are a part of another work, such as a contribution in an edited book. In Citavi we refer to the **Parent reference** as a work consisting of multiple discrete works. Individual works within the parent reference are added as **child references**. You can cite and quote from parent and child reference separately.

For example, a contribution in an edited book is a discrete work within an edited book, so the **edited book** is the parent reference, and the **contribution** is the child reference. By connecting parent and child references, you ensure that multiple contributions in one work are all cited correctly when you format your publication.

- **Archive Material** : Written, pictorial, or audiovisual material stored in an archive. Typical defining characteristics of archive material are their uniqueness and that they are housed in an archival collection. If these characteristics are present, use this reference type for documents that might otherwise be added as a Journal Article; Audio, Video, or Film Document; Manuscript; Map; Newspaper Article; File; Statute or Regulation, etc.

- **Audio Book**: Audio recording of a reading of a text , published on media such as cassette, CD, or audio file. *Cf. Radio Play* (since radio plays are sometimes adaptations of literary texts, these reference types can easily overlap). Readings which were only broadcast on the radio and are not available for sale should be cited with the Radio or TV Broadcast reference type.

- **Audio or Video Document**: Any recording of a documentary nature using audio, moving images, or both, which is published on tape, DVD, CD, film, etc. (e.g. educational and documentary films and slideshows as well as historical recordings of speeches and other events). *Cf. Audio Book, Radio Play, Movie,* and *Radio or TV Broadcast.*

- **Book**: A single independent, complete work, written by one author or a team of authors who share the responsibility of the text (in one volume or a finite set of volumes). *Cf. Edited Book* and *Collected Work.*

- **Book, Edited**: A single or multi-volume work with discrete contributions from various authors which is compiled by one or more editors. Includes dictionaries and encyclopedias. An edited book which does not have a publisher should be referenced as an Unpublished Work. *Cf. Conference Proceedings, Special Issue,* and *Collected Work.*

- **Collected Work**: A selected or complete collection of the work of an author in one or more volumes. This can range from a small anthology of fiction to a collection of an author's scholarly writings, or to a historical-critical edition of the complete works of an author. To cite a single work from a collected work, use the **Contribution** reference type. *Cf. Book* and *Edited Book.*

- **Conference Proceedings**: A collection of papers from a scholarly conference in one volume. *Cf. Edited Book* and *Special Issue.*

- **Contribution**: A discrete piece of writing (including editorials, afterwords, etc.) in an Edited Book, Conference Proceedings, a Special Issue, or in an Unpublished Work; an entry in an encyclopedia; or an individual work in a Collected Work. Before you add a contribution, add the parent reference first. *Cf. Contribution in Legal Commentary, Journal Article,* and *Newspaper Article.*

- **Contribution in Legal Commentary**: An interpretation and explanation of one or more articles or paragraphs of a law (as a contribution in a commentary). Before you add a contribution, add the Legal Commentary first.

- **Court Decision**: A ruling or decision handed down by a court to conclude proceedings.

- **File:** A collection of related documents resulting from administrative or economic activity (*not* computer files). A file normally comprises multiple documents. Closed records which are stored in an archive should be referenced as Archive Material. *Cf. Manuscript.*

- **Internet Document**: A text, image, or multimedia document (Web page, Office, or PDF file, etc.) offered primarily on the Internet. Internet documents which are also available in print as unpublished work should use the Unpublished Work reference type. Books in electronic form should not be added as Internet Documents. The Internet address can, however, be noted with the original work in the **Companion website** field. Use the Thesis reference type for theses and dissertations that are available online.

- **Interview Material**: An unpublished recording of or notes from an interview. Published interviews should be cited in the bibliography according to the format in which they were published (Newspaper Article, Radio or TV Broadcast, etc.).

- **Journal Article**: An article by an author or a team of authors published in an academic or scholarly journal or other periodical. *Cf. Newspaper Article* and *Contribution.*

- **Lecture**: Notes or a handout from an unpublished speech, talk, or lecture, or a recording of it. Published lectures should be cited in the bibliography according to the format in which they were published, e.g. as a Journal Article or as a Contribution.

- **Legal Commentary**: A commentary on one or multiple laws, published as one or more volumes or as a looseleaf collection.

- **Manuscript**: An unpublished document written by hand, on a typewriter, or on a computer. A manuscript is still a manuscript if it is duplicated privately (e.g. photocopies). If a manuscript is published on the Internet, add it as an Internet Document; if it is published privately, add it as an Unpublished Work. *Cf. File* and *Unpublished Work*

- **Map**: A map or collection of maps, such as an atlas. Unique pieces such as hand-drawn maps can be cited in the bibliography as manuscripts, or as archive material if they are housed in an archive.

- **Movie**: A motion picture of primarily fictional nature intended for public distribution or viewing. *Cf. Radio or TV Broadcast* and *Audio or Video Document.*

- **Music Track**: A single piece of music (song, sonata, small symphony, etc.) which is published along with other pieces of music on an album. Before you add a music track, add the Musical Work or Music Album first.

- **Musical Work / Music Album**: A larger piece of music (symphony, opera, etc.) or a collection of multiple pieces (album) published on an audio recording medium.

- **News Agency Report:** A news report written by a news agency and provided to the media. *Cf. Press Release.*

- **Newspaper Article**: An article by an author or team of authors in a daily or weekly newspaper. *Cf. Journal Article* and *Contribution.*

- **Patent**: Documentation of a patent (the legal right to exclusive use of an invention such as a design, process, or method) or a patent application.

- **Personal Communication**: Information communicated via letter, fax, e-mail, telephone, or in person. This reference type is appropriate for personal use, but also to collect information as raw material for scholarly or journalistic work. Published letter exchanges should be referenced as a Book or as a Collected Work; personal communication housed in an archive should be referenced as Archive Material.

- **Press Release**: Official text and image material provided to the press by a company, organization, government official, etc. *Cf. News Agency Report.*

- **Radio or TV Broadcast**: A program produced for and broadcast on the radio or on TV. *Cf. Audio Book, Radio Play, Movie,* and *Audio, Video, or Film Document.*

- **Radio Play (Audio Drama)**: A dramatic work presented using only sound and broadcast on the radio or sold as a recording. *Cf. Audio Book.*

- **Software**: A computer program, whether published on a storage medium or available on the Internet. *Cf. Internet Document.*

- **Special Issue**: An issue of a periodical published in addition to the regular issues, with its own editor, and typically devoted to a specific topic. *Cf. Conference Proceedings* and *Collected Work.*

- **Standard**: A set of requirements and criteria (for example, quality, dimensions, materials, or protocols) agreed upon and passed by a standards body.

- **Statute or Regulation**: An edict such as a law, ordinance, or regulation from a national or international legislative or administrative body.

- **Thesis**: A document, typically presenting original research, submitted to fulfill requirements of a degree. Depending on the degree and country, it may be called a thesis, dissertation, etc. If a thesis is available only at

the university library (or database of theses), use the thesis reference type. A published thesis should be referenced as a Book reference type.

- **Unknown**: Use this reference type as a stopgap when you have unclear or incomplete bibliographic information from another source that doesn't clearly indicate the reference type. Check the original source as soon as possible and then assign the appropriate reference type.

- **Unpublished Work**: Printed matter not published by a commercial publisher and not available from a bookseller, but instead published and distributed by the authors or editors themselves. Examples: Reports from universities and research institutions; papers from organizations, agencies or companies; flyers; and advertising brochures. Such papers are often solely or additionally published on the Internet as a PDF document. However, they should not be cited in the bibliography as an Internet Document, but as Unpublished Work (including the Internet address).

3.3.4 Changing Reference Types

Occasionally, you may need to change the reference type for one of your references. For example, you may realize that a book is in fact a collected work.

Changing the Reference Type for a Single Reference

To change the reference type of the current reference:

1. In the **Reference Editor**, on the **Reference** tab, click the name of the current reference type.
2. Choose the new reference type from the list and click **OK**.

Changing the Reference Type for Multiple References

To change the reference types of multiple references at the same time:

1. Open table view by clicking **Table** in the toolbar.
2. To select references, hold down **Ctrl** and click each reference you want to change
3. On the **References** menu, click **Change reference type** (or press **Ctrl+R**).
4. If a message appears telling you the number of references being edited, click **OK**.
5. Choose the new reference type and then click **OK**.

After changing reference types, you may find that certain fields are no longer shown. For example, if you entered a series title in a Contribution in an Edited Book and then change the reference to a Journal Article, the **Series title** field will be hidden. The contents of the field, however, are not discarded. To see all the information you entered for the particular reference, even in fields not normally shown for the selected reference type, switch to the **Reference Editor** and click the **Reference** tab. Click **More fields** near the bottom of the pane. Select the **Show all non-empty fields on the Reference tab automatically** checkbox.

3.3.5 Short Titles, Citations, and Citation Keys

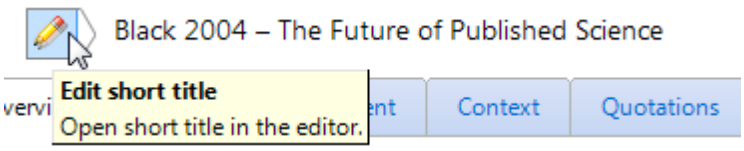
Short Titles

Every new reference you enter in Citavi is given a **short title** used to identify it within a project. Citavi automatically generates a short title for every reference, but you can change it at any time.

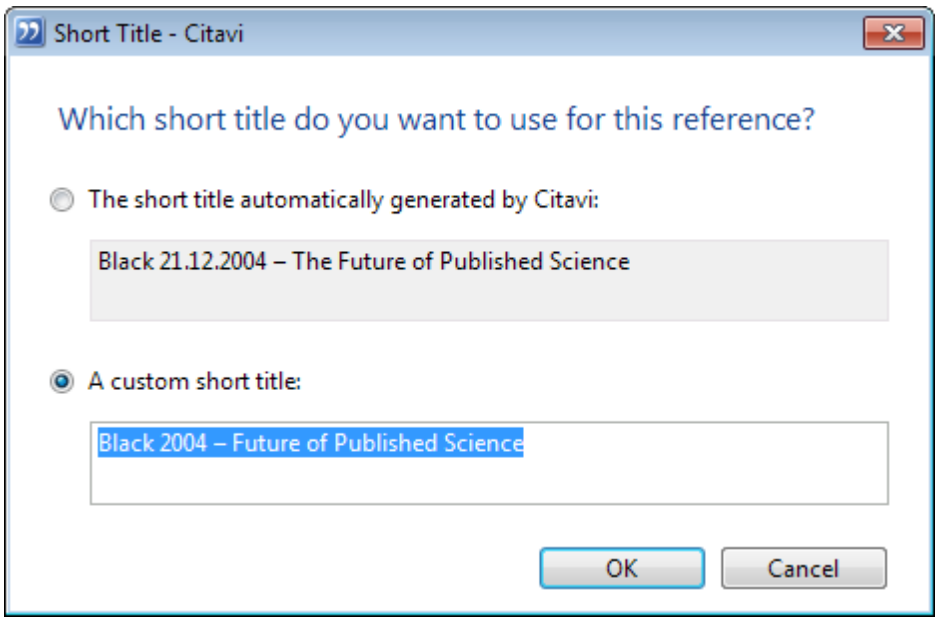
Citavi creates the short title following this model: "Bawden 2001 – Information and Digital Literacies". The last name is first, followed by the year of publication, then a dash, and then the beginning of the title.

To change the short title, you can double-click it, or you can hover the mouse pointer over the short title that

appears just below the toolbar and then click **Edit**:



Type the new short title and then click **OK**:


Short Title - Citavi
Which short title do you want to use for this reference?
The short title automatically generated by Citavi:
Black 21.12.2004 – The Future of Published Science
A custom short title:
Black 2004 – Future of Published Science
OK
Cancel

The Citavi short title is not intended for use in your formatted paper. Instead, Citavi will generate formatted **citations** in the text or in a footnote, for example `(Bawden 2001)` or `Bawden 2001, Literacies`, or even just a number, like `[24]`. Citations are formatted solely by the citation style, so you do not need to worry about them when entering information.

Citation Keys

A few citation styles use in-text **citation keys** — for example [Baw01] — to refer to specific references. For example, a citation key might consist of the first word of the title, without articles, or the first letters of the last names of the first three authors of a reference.

The **Citation Key Editor** lets you define the rules for generating citation keys with even more control than the citation style editor allows. On the **Tools** menu, click **Options**, then select the **Citation key support** checkbox and click **Configure**.

Summary

- **Short titles** help you to quickly find a reference within Citavi.
- **Citations** are used in your paper to cite references whose full bibliographic information is given in the bibliography.
- **Citation keys** are rare but also are used to cite references whose full bibliographic information is given in the bibliography. You can define the template used to generate citation keys automatically, and you can change a citation key manually if necessary.

3.3.6 Duplicating a Reference

Sometimes you may want to use an existing reference as a starting point to speed up the process of adding similar references, for example when recording multi-volume works or several articles from a journal. In such

cases, Citavi lets you create a copy of an existing reference where you only need to make a few minor modifications.

Duplicating a Reference

1. Open the reference you want to duplicate in the Reference Editor.
2. On the **References** menu, click **Duplicate**.
3. Citavi creates a copy of the reference and adds the prefix `[Copy]` to the title. Make the necessary changes to the copy and then remove the `[Copy]` prefix.

3.3.7 Tips for Names of Persons

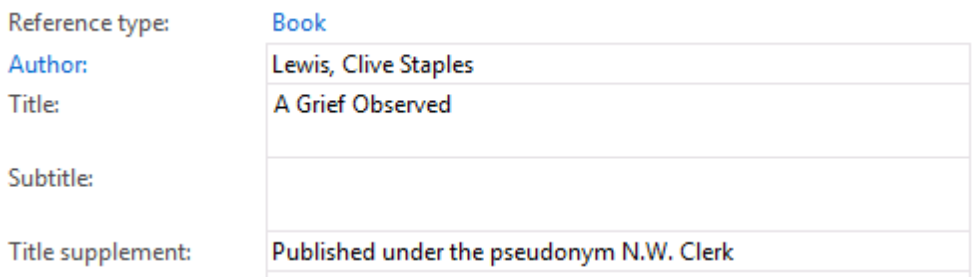
Most names consist of a first name and a last name and are therefore easy to add. Things become complicated when you want to record a title of nobility or a name affix.

In general, you should record a person's name the same way they use it themselves. The following cases are exceptions:

Exception	Example
Biblical names	Paul [Apostle]
Ancient Greek, Ancient Roman or Byzantine names	Andron [Alexandrinus] Andron [Historicus] Andron [Teius]
Medieval names	Bernardus [Claraevallensis] Bernardus [de Waging]
Names of royalty	Louis [France, Roi, XI.] Louis [France, Roi, XVI.]
Names of popes and clerical dignitaries	Pius [Papa, X.] Pius [Papa, XII.]
Names of very famous people that are often cited with different affixes	Cranach, Lucas [The Elder] Cranach, Lucas [The Younger]

Open the author details dialog by placing the insertion point in the **Author** or **Editor** field, then pressing **F9**) and enter the name affixes in brackets following the last name.

If the person published using a **pseudonym**, enter his or her real name in the author field. Make a note of the person's pseudonym in the **Title supplements** field, space permitting.



There are no consistent rules for when you should cite a pseudonym instead of a real name. If a person is generally known by his or her pseudonym, his or her works are listed under this name (for example, Caravaggio), it is usually fine to cite the person by his or her pseudonym.

Titles of nobility, job titles, clerical titles, honorary titles, and similar are usually not considered when recording people's names:

Example	in Citavi
Otto, Prince of Bismarck	Bismarck, Otto von
Prof. Dr. Norbert Henrichs	Henrichs, Norbert
Sir Peter Ustinov	Ustinov, Peter
Father Alban Dold, O.S.B.	Dold, Alban

Prefixes

Prefixes — prepositions, articles and their combinations — are linked to either the first or last name depending on the language region or citation style. Use the author editor to specify how names should be recorded by placing the insertion point in the **Author** box and pressing **F9.**

If you decide not to enter a person's name using the author editor, please note the following rules:

In German-speaking areas, prefixes are attached to the person's first name:

Example	in Citavi
Max von der Grün	Grün, Max von der
Karl Reichsfreiherr vom und zum Stein	Stein, Karl vom und zum

Prefixes are attached to the last name as follows:

a) if prepositions and articles are placed before the surname:

Example	in Citavi
Jürgen vom Scheidt	Vom Scheidt, Jürgen

b) in Luxembourgian names:

Example	in Citavi
Émile van der Vekene	Van der Vekene, Émile

c) in English-speaking areas:

Example	in Citavi
Daphne du Maurier	Du Maurier, Daphne
Knightley d'Anvers	D'Anvers, Knightley

d) the Scottish "Mac/Mc" is always part of a last name:

Example	in Citavi
Arthur MacDonald	MacDonald, Arthur

e) in French, Italian and Spanish names as with names of Latin origin:

Eample	in Citavi
Jean de La Fontaine	La Fontaine, Jean de
Antonio Di Pietro	Di Pietro, Antonio
Maria Della Casa	Della Casa, Maria
Gertrud von le Fort	Le Fort, Gertrud von

Multiple Last Names

In Spanish and American names, a person may have two different surnames. In Spanish, use the first surname to reference the person. In American English use the second last name.

Example	in Citavi
Luis Eduardo Romero Vera	Romero Vera, Luis Eduardo
Martin Luther King	King, Martin Luther

Hyphenated names are regarded as one name and are recorded as such.

Example	in Citavi
Dieter Meyer-Renschhausen	Meyer-Renschhausen, Dieter
Klaus-Dieter Meyer-Schmidt	Meyer-Schmidt, Klaus-Dieter

3.3.8 Entering Special Characters

Fundamentally, the input language and keyboard layout are set in the operating system. Refer to Windows help for assistance. In this regard, Citavi behaves like any other word processor.

In addition, Citavi has a special command to convert Unicode codes: type the four-digit code of a character (such as `00E5` to get the character **å**) into a text field and press **Ctrl+Alt+U**. Citavi transforms the last four characters into a Unicode character, as long as a valid code was entered.

You can also right-click a text field and use the **Special characters** menu to enter many characters directly or to open the Windows Character Map.

3.4 Four Examples of Adding References

This section explains how to add the four most common types of references:

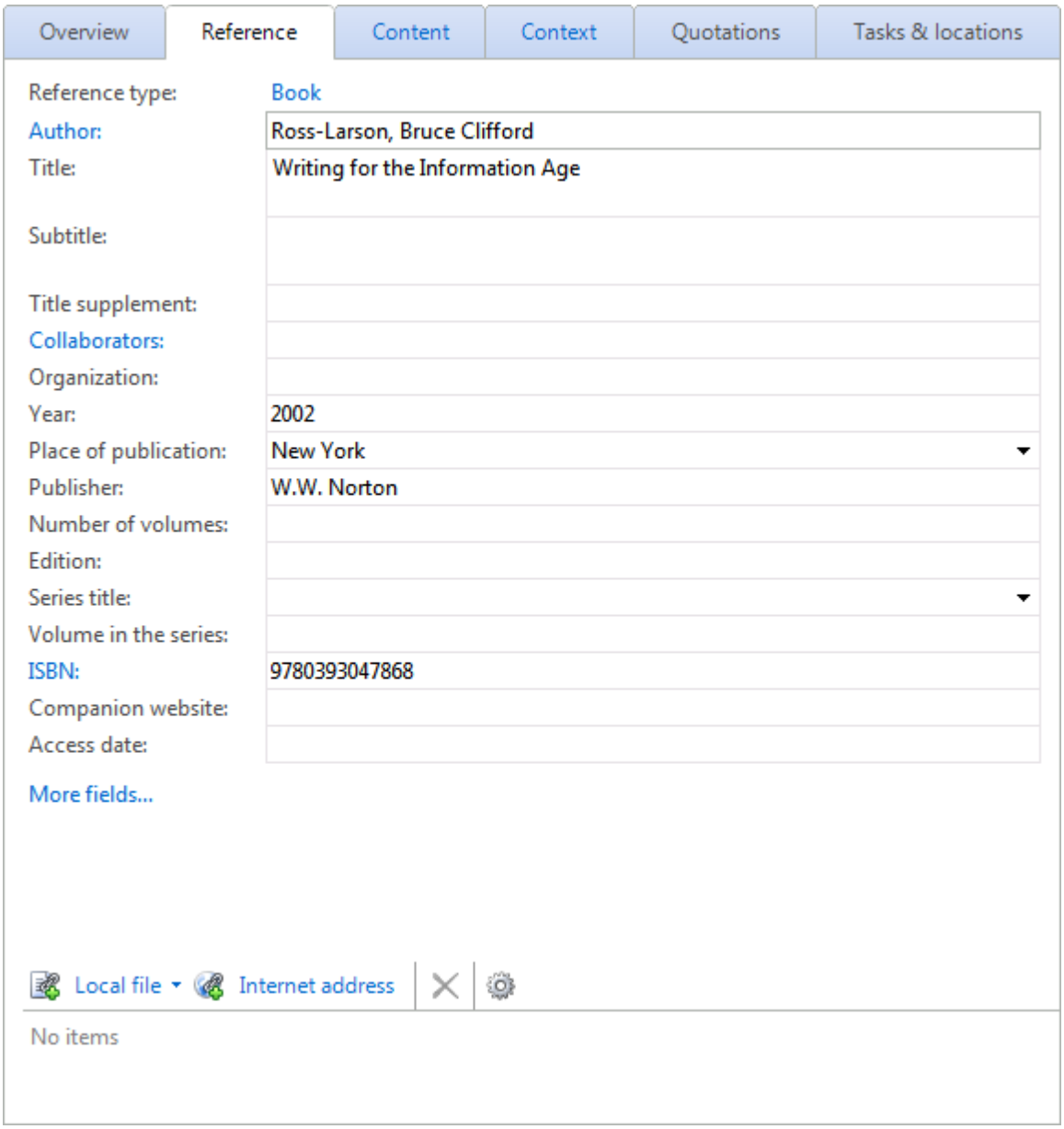
- Books
- Contributions in edited books
- Journal articles
- Internet documents

3.4.1 Adding a Book

Books are the easiest references to add to Citavi. The only thing you have to decide is whether you have a regular book (also known as a monograph), an edited book, or a collected work. In Citavi, the reference type *book* refers to a single independent, complete work, written by one author or a team of authors who share responsibility for the text (in one volume or a finite set of volumes).

In contrast, an *edited work* refers to a single or multi-volume work with discrete contributions from various authors which is compiled by one or more editors. A *collected work* refers to a selection or complete collection of the work of a single author in one or more volumes.

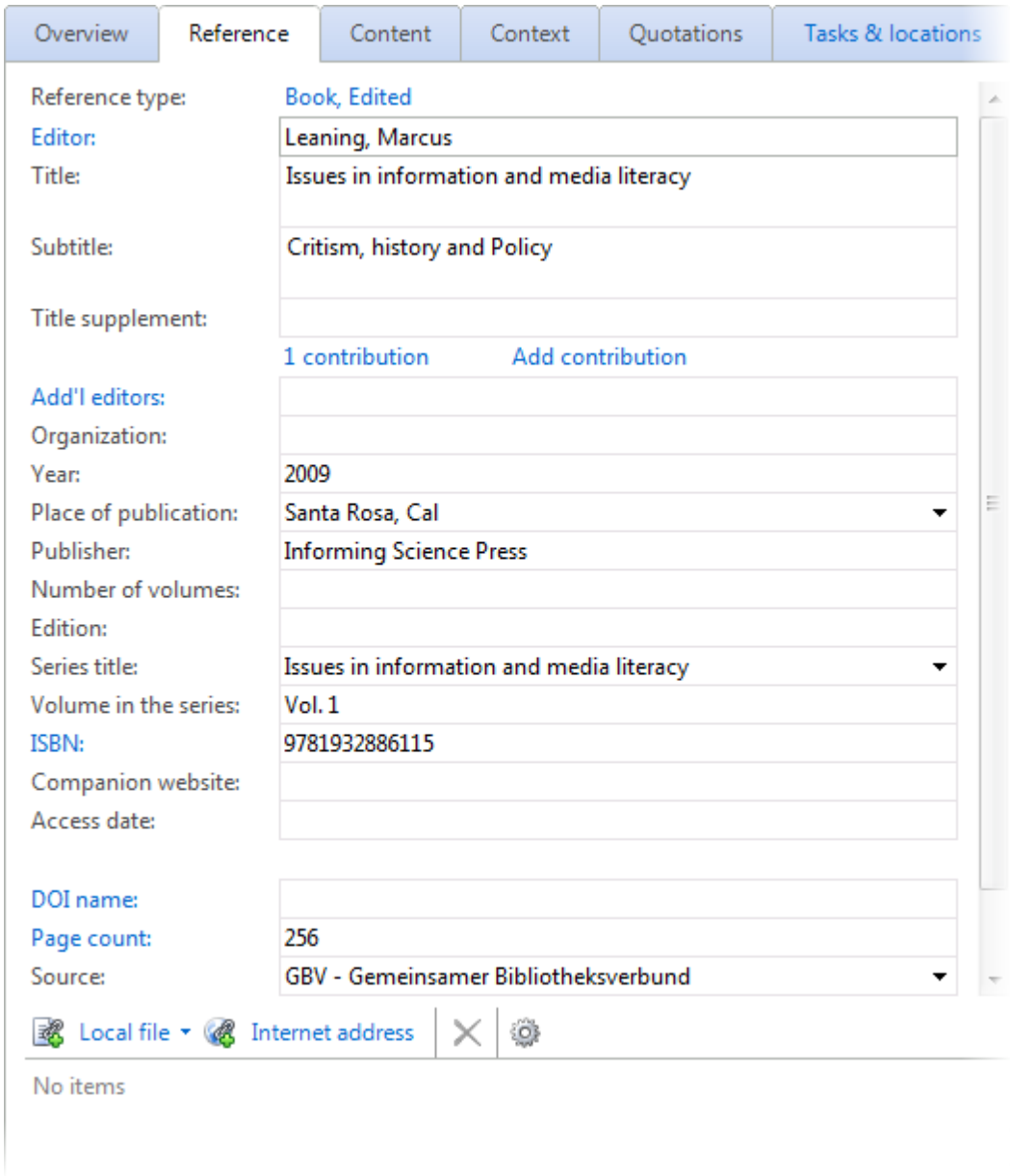
To add a book as a reference, the basic bibliographic information you need is the **author** (last name, first name), the **title**, the **place of publication**, and the **year**.



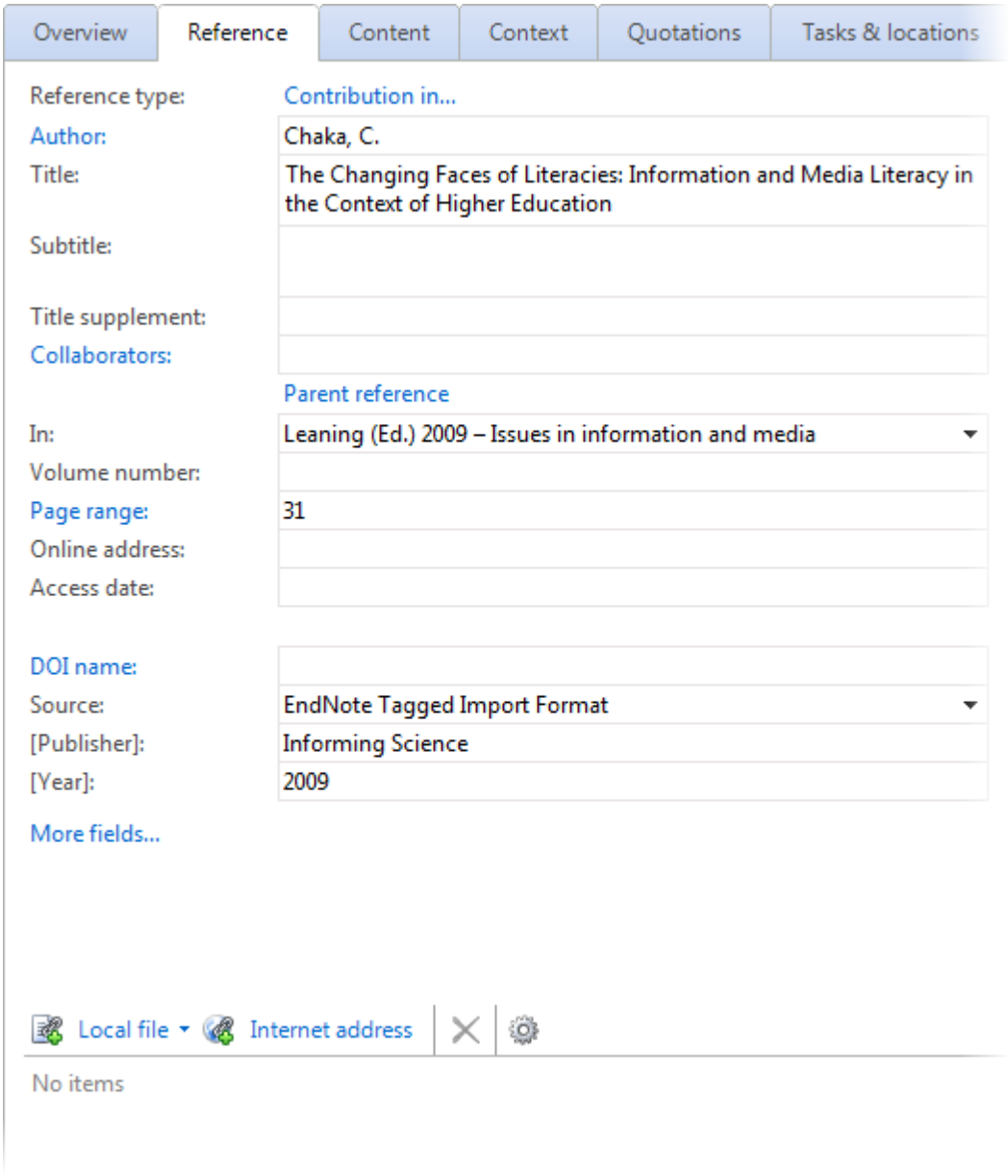
Hint: Put the name of a translator in the **Title supplement** field, for example "`translated from the German by Anna Miller`".

3.4.2 Adding a Contribution in an Edited Book

Unlike a regular book, contributions in an edited book are dependent publications which must be "children" of a parent reference. Adding a contribution in an edited book requires two steps. First, add the edited book itself (choose the **Book, Edited** reference type). This is the parent reference. Note that the **Editor** field appears in the place usually held by the **Author** field.



Second, add the contribution that appeared in the edited book. This is the child reference. On the **Reference** tab for the edited book, click **Add contribution**. A new **Reference** tab appears for the contribution.

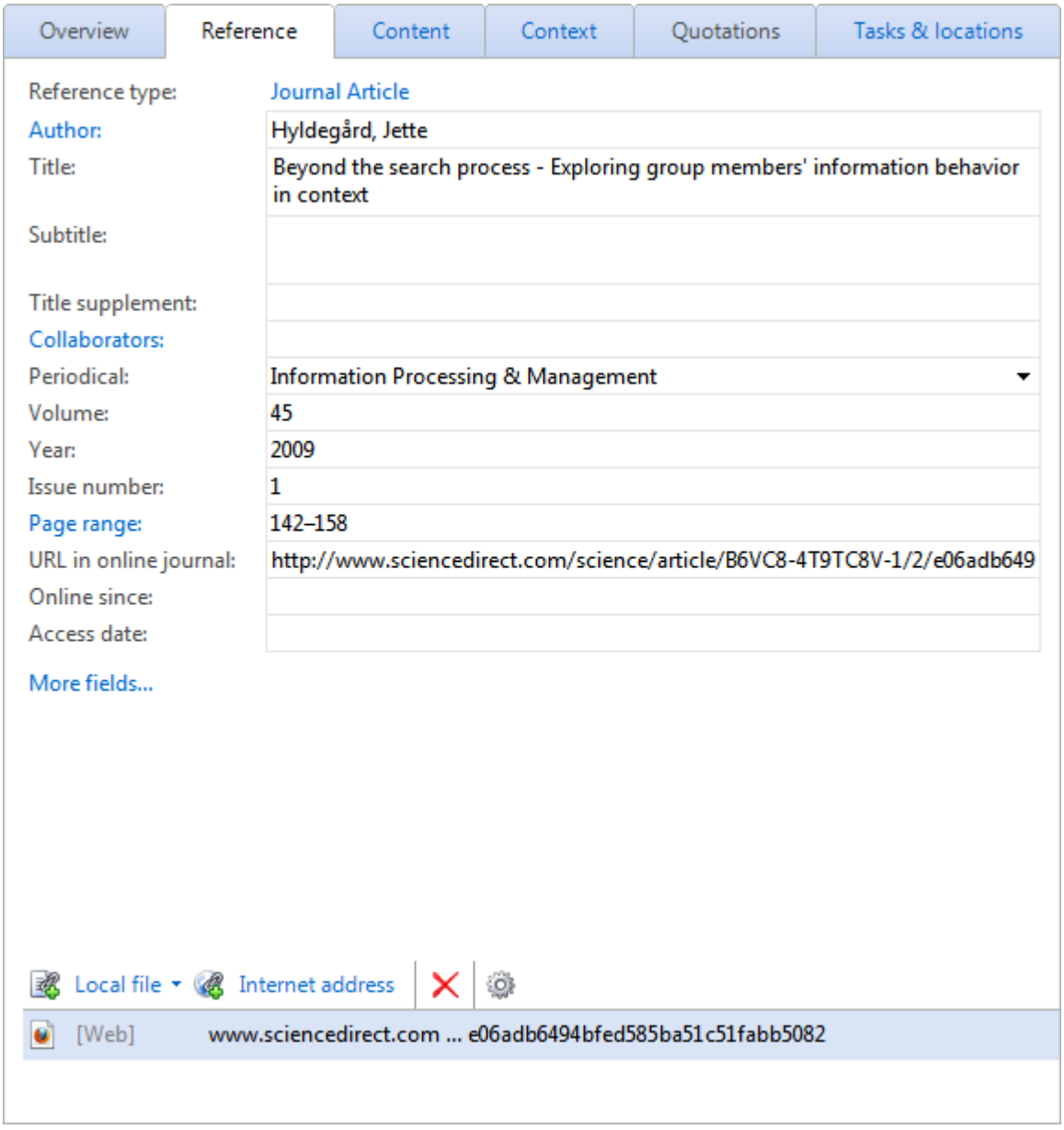


Below the fields for the basic bibliographic information, there is a link to the parent edited book, and below that a field to change the parent reference if necessary. You can also specify which *volume* the contribution is in, as well as *which pages* it is on.

3.4.3 Adding a Journal Article

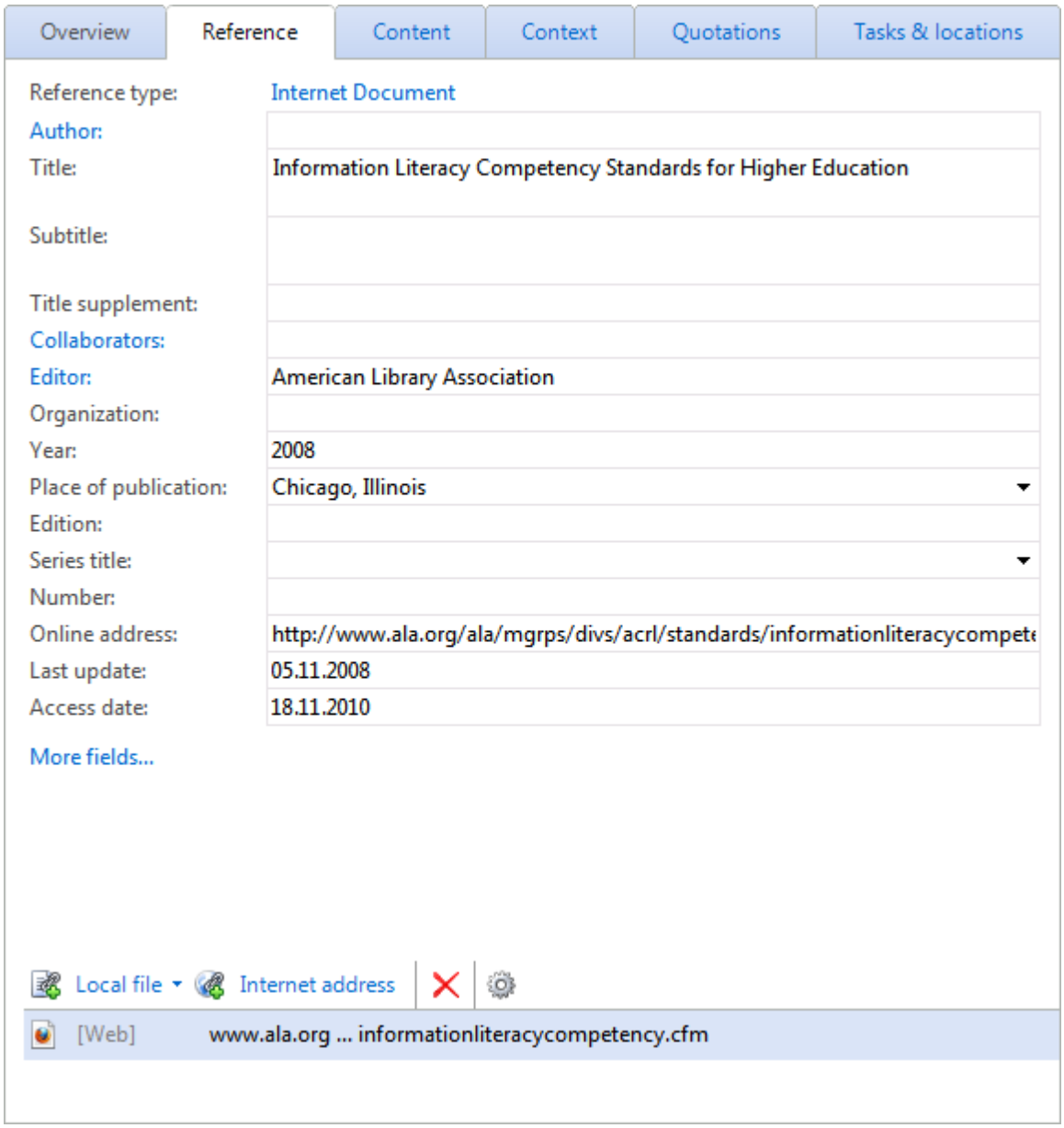
Journal articles are a type of dependent publication since each individual article can be viewed as a discrete part of the journal as a whole. Journals are similar to edited books but differ in that they are published at regular intervals and usually are specific to a given subject area.

There is no need to list the editor when citing a journal article. Instead, only the author or authors of an article need to be named. Other essential information includes the volume and/or year, the issue number, and the exact page numbers on which the article can be found.



3.4.4 Adding an Internet Document

Electronic publications must be cited somewhat differently than items in print format. While an electronic publication usually has an author and a title, just as a printed work does, its citation needs to include its Internet address (URL), date of access, and date of last update instead of the publisher and place of publication. Use the **Internet Document** reference type.

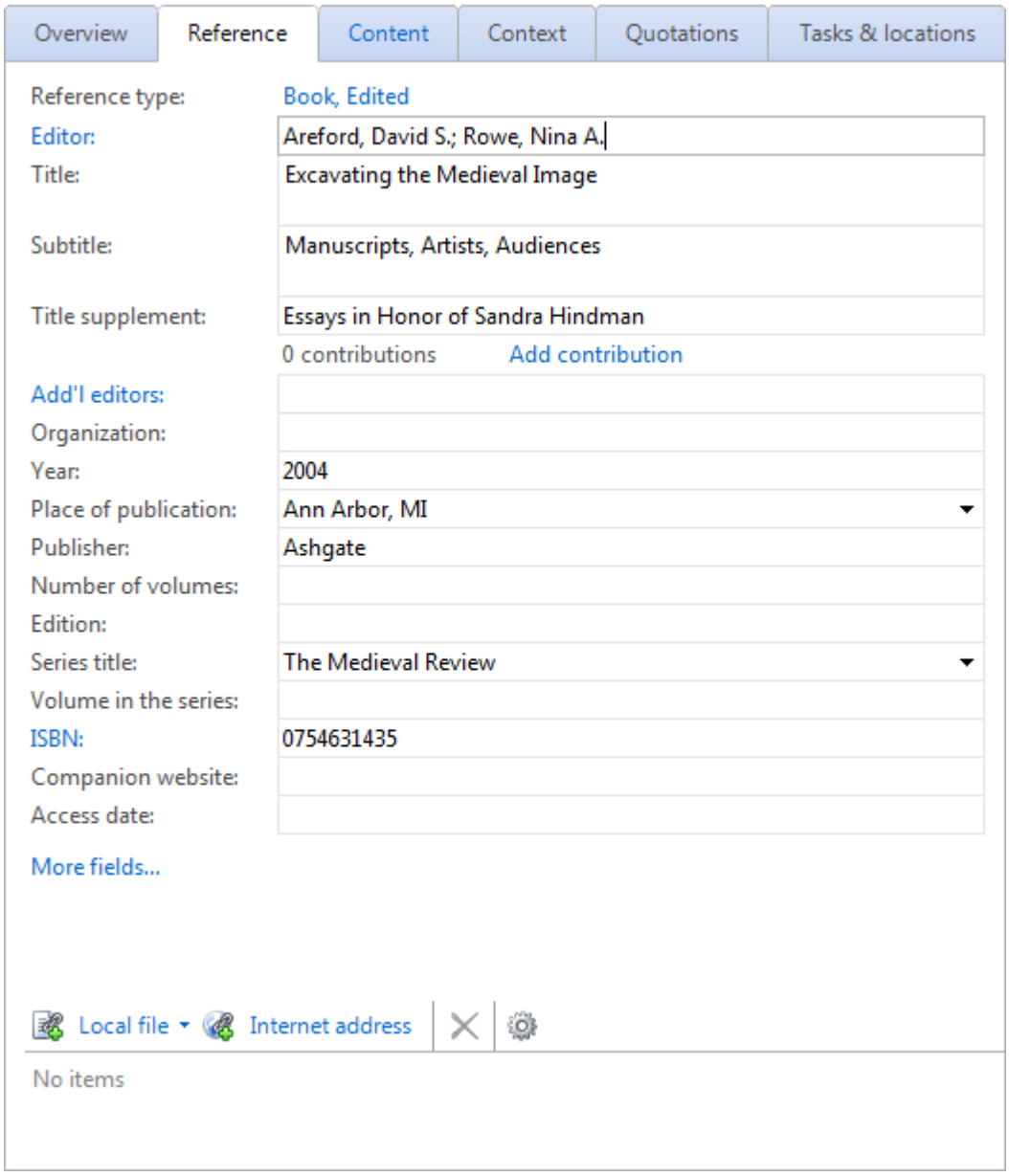


3.5 Special Reference Types

It happens: you have a work in front of you, but you cannot decide which reference type is the best fit. Here are some tips! And if you still need help, our online support can be of further assistance.

3.5.1 Adding a Festschrift

A festschrift is a collection of individual contributions, so as a rule it can be handled in the same way as an **edited book**. The image below shows how you can add a festschrift:

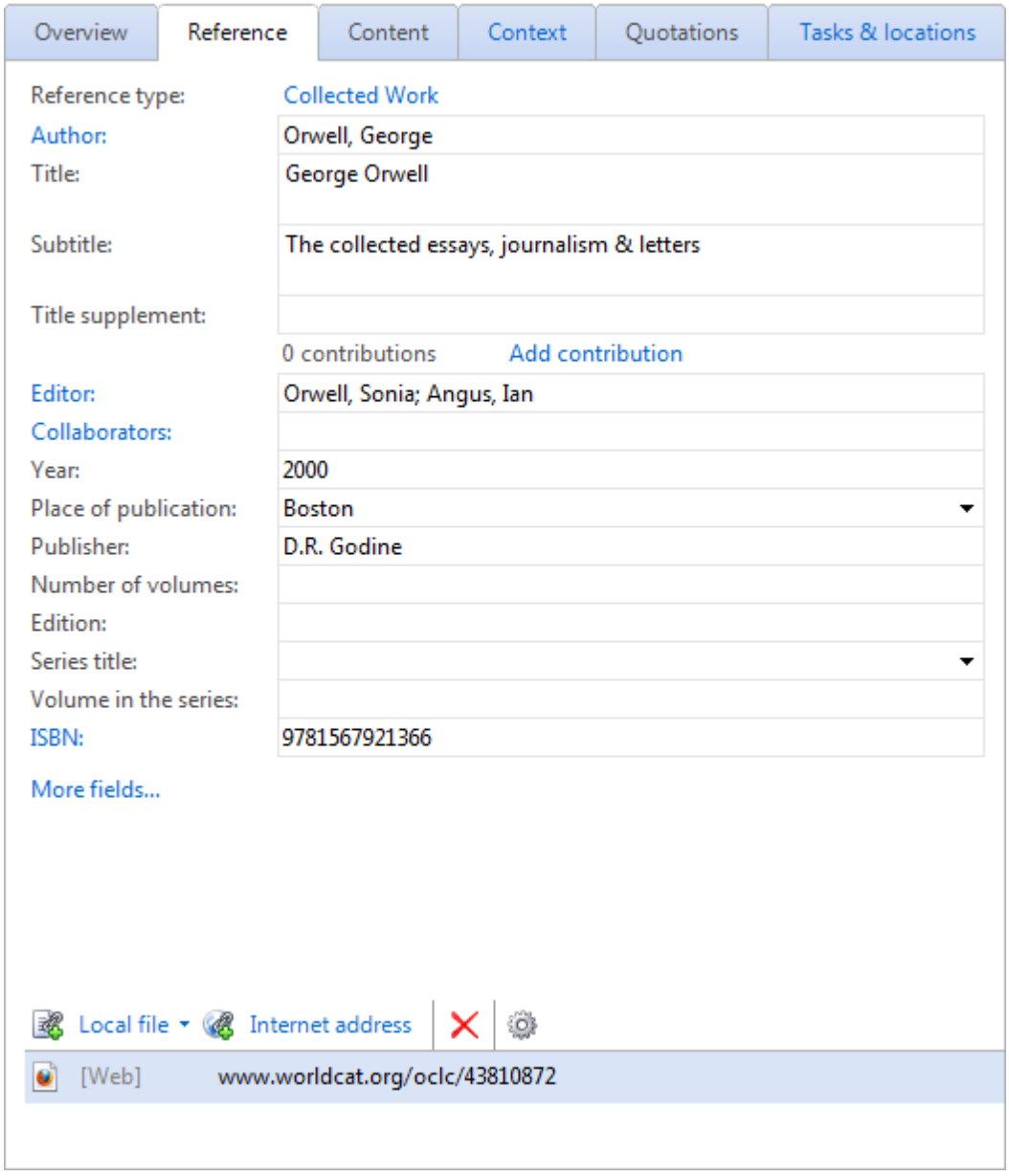


Enter information about the festschrift in the **Title Supplement** field.

3.5.2 Adding Collected Essays

An author's shorter works are occasionally published as collected essays. In theory, the individual pieces can be seen as discrete monographs; however, in practice it is easier to treat the reference as a **Collected work** and to add each individual essay as a **Contribution**.

The diagram below illustrates how you can add a collection of an author's essays to Citavi:



3.5.3 Adding a Special Issue

When adding entire issues of a journal, there are three different cases to consider:

Special Issue of a Journal

Special issues, like edited books, consist solely of contributions pertaining to a particular subject. If this characteristic is met, you should add the issue as a **Special issue**. Additional characteristics of special issues may include the following:

- The editor of the issue is not the usual editor or editorial team.
- The issue follows separate page numbering.
- The issue has its own ISBN number (in addition to the ISSN number, which identifies the periodical).

However, like edited books, a special issue or supplement is not normally cited directly. It is customary to cite the specific contribution in the special issue, including the author of the contribution and the page numbers. For these, use the **Contribution** reference type.

Issue of a Journal

Some issues of a periodical appear to be special issues, but in fact are normal issues which simply have one topic highlighted on the cover. These issues follow the regular pagination of the journal. Treat these as ordinary journals and add the contributions using the regular **Journal article** reference type.

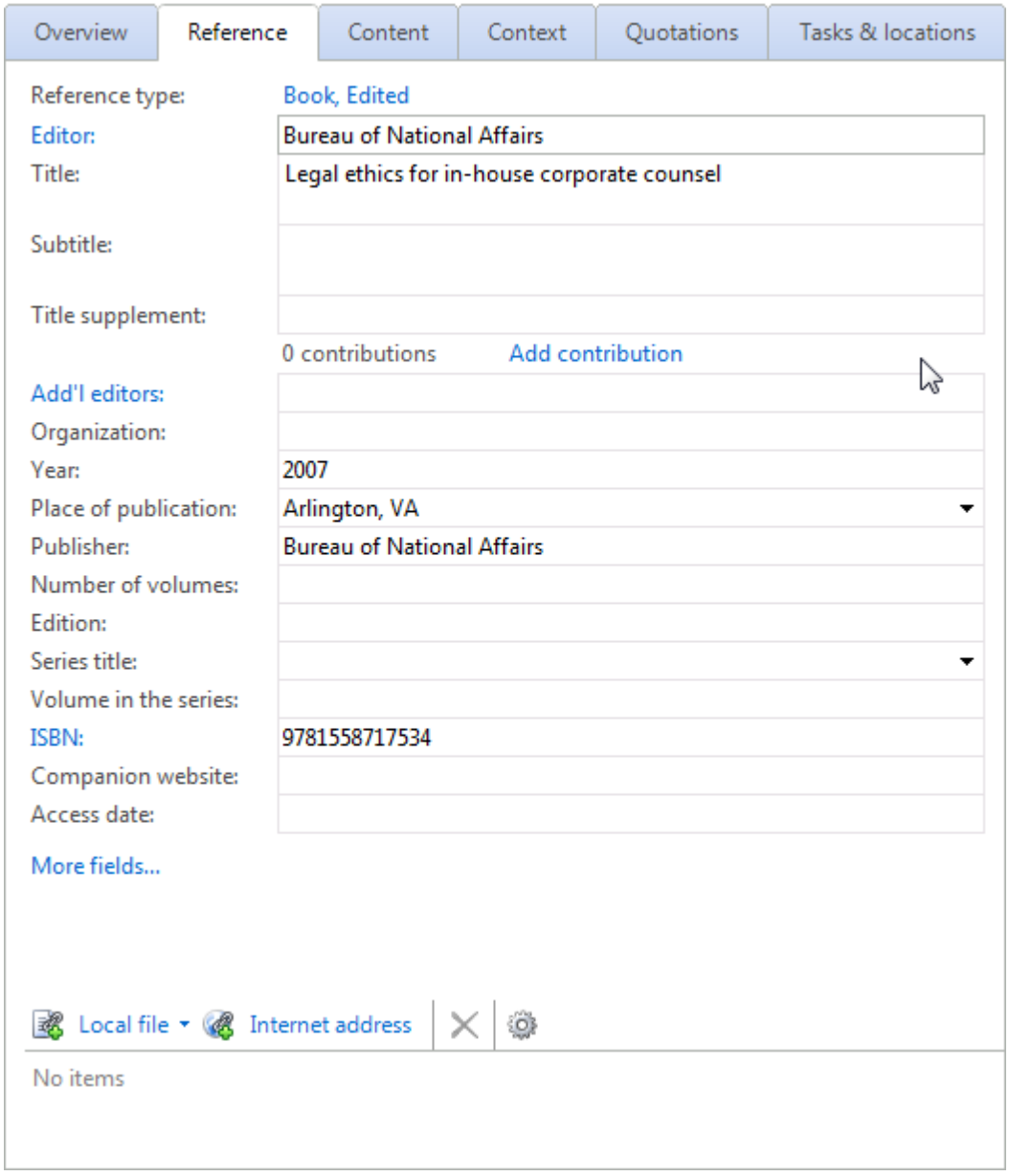
Special Issue of a Magazine

Some popular magazines publish issues dedicated to specific topics. Generally, these are unsuitable for use in scholarly works because they are not peer-reviewed. For this reason, there is no reference type in Citavi intended for these references. In principle, a special issue of a magazine could be added as an edited book, but this may be problematic.

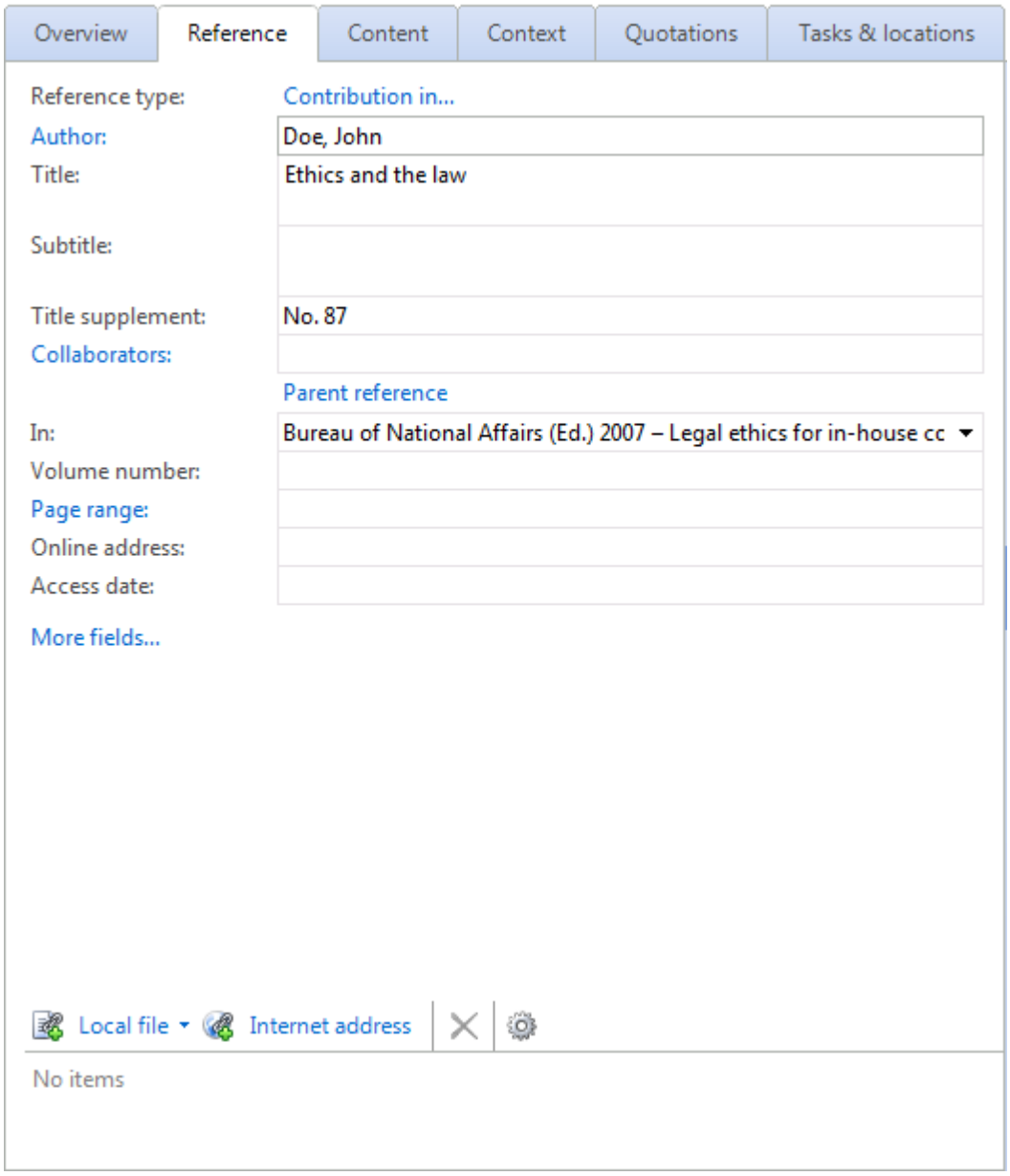
3.5.4 Adding a Loose-Leaf Collection

As a rule, loose-leaf collections are made up of multiple contributions, which are periodically replaced or expanded upon. The basic collection can be added to Citavi as an **Edited Book**. For individual contributions and additions, use the **Contribution** reference type.

The screenshot below shows how the collection can be recorded in Citavi:



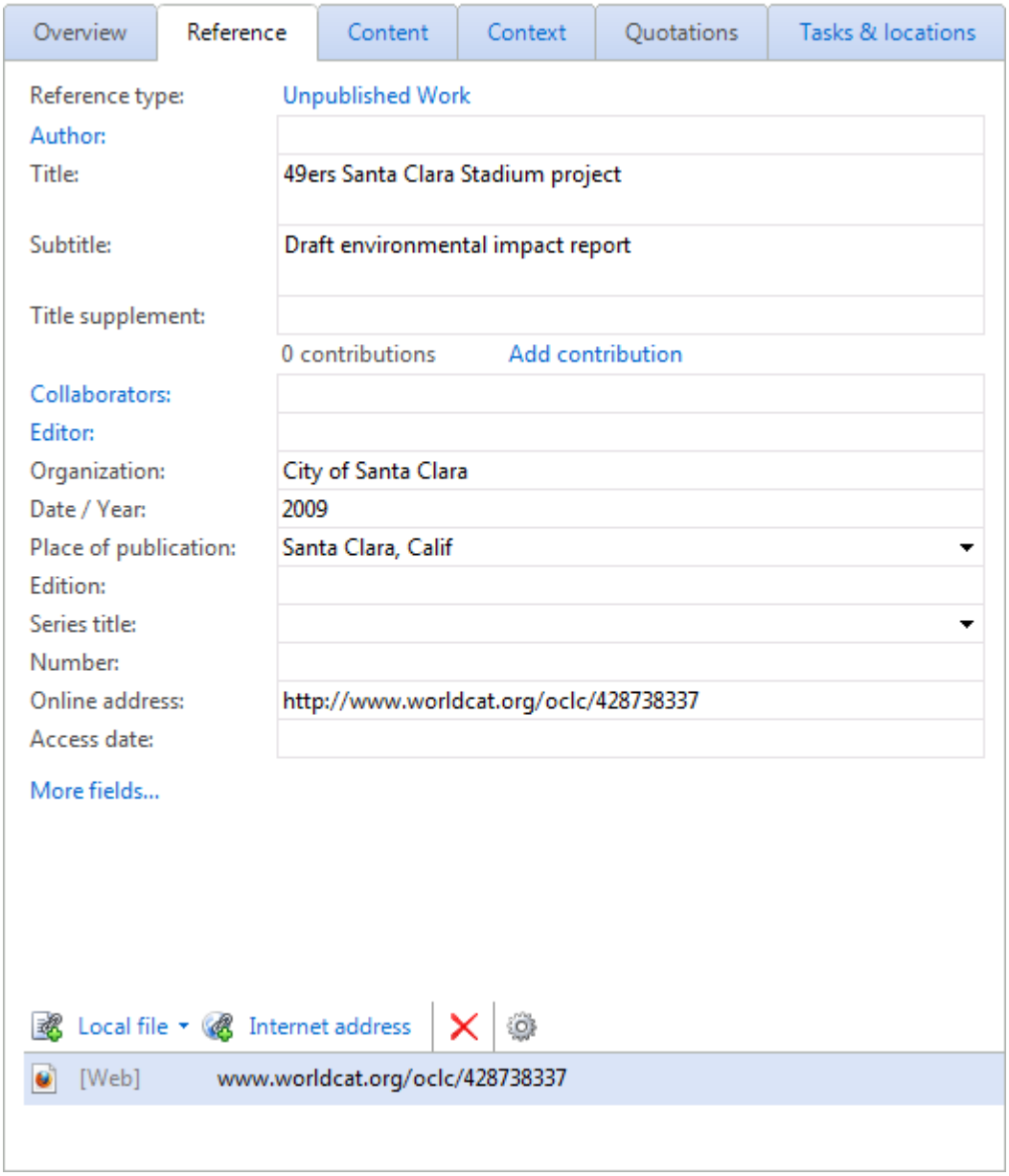
Click **Add contribution** to add a contribution to a loose-leaf collection:


Overview
Reference
Content
Context
Quotations
Tasks & locations
Reference type:
Contribution in...
Author:
Doe, John
Title:
Ethics and the law
Subtitle:
Title supplement:
No. 87
Collaborators:
Parent reference
In:
Bureau of National Affairs (Ed.) 2007 – Legal ethics for in-house cc
Volume number:
Page range:
Online address:
Access date:
More fields...
Local file
Internet address
No items

3.5.5 Adding a Report

Reports are not generally commercially published or released through booksellers. Reports can best be added in Citavi by choosing the **Unpublished Work** reference type.

The following screenshot shows how to add a report in Citavi:

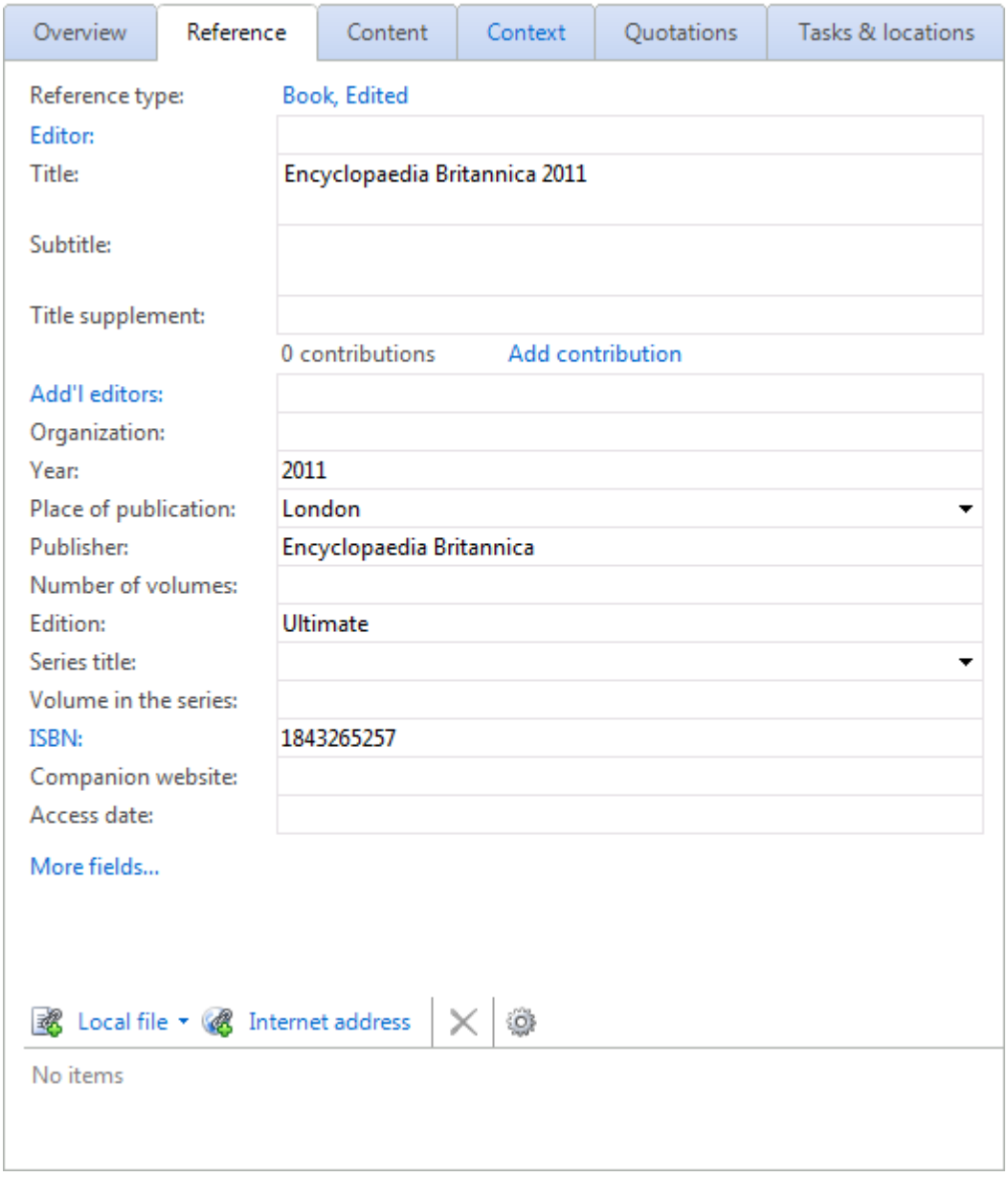


3.5.6 Adding an Encyclopedia Entry

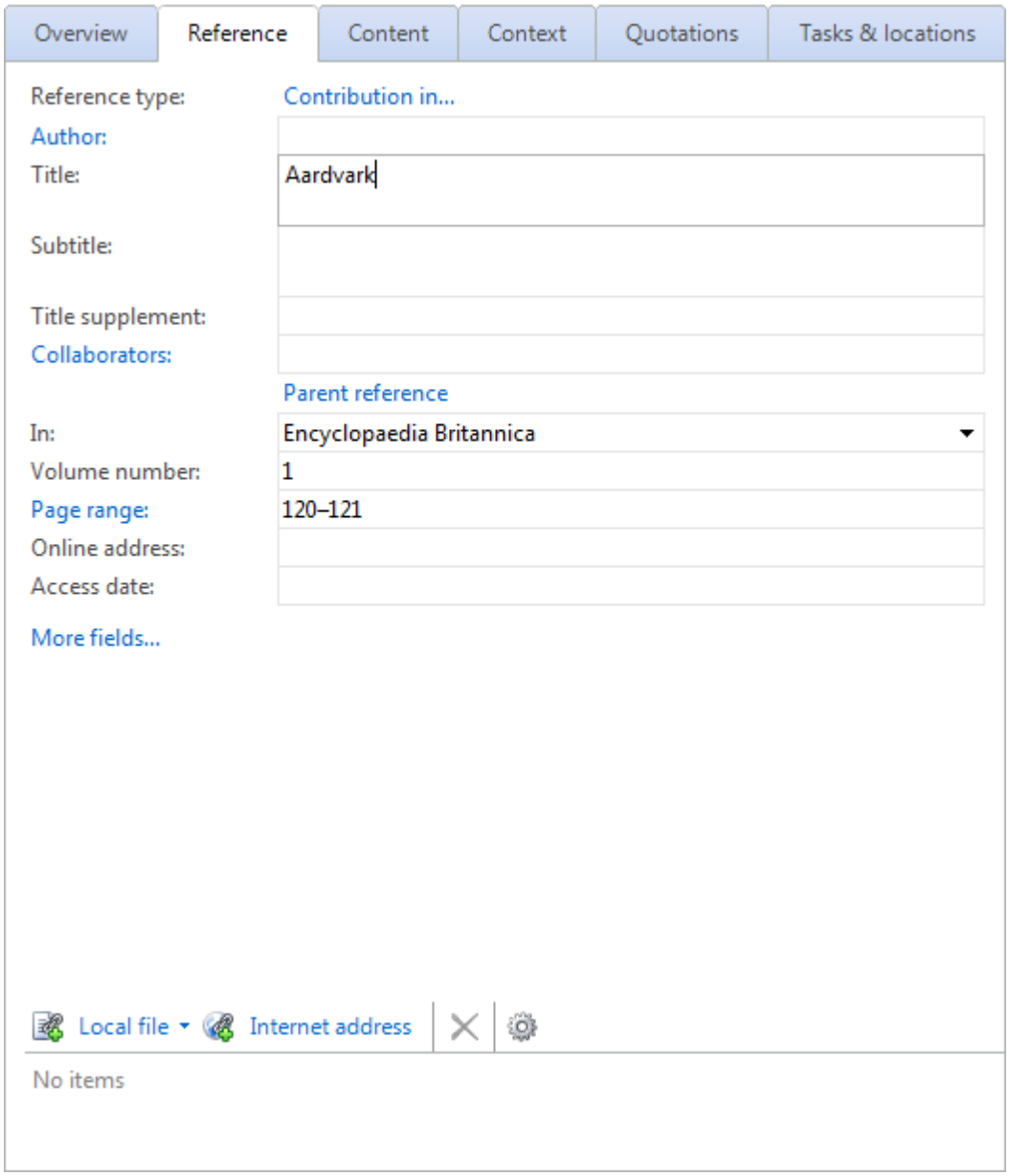
When referencing a printed encyclopedia, add the encyclopedia as an **Edited Book** first and then add each article as a **Contribution**.

For articles from online editions of encyclopedias such as the Encyclopædia Britannica or from online-only encyclopedias like Wikipedia, use the **Internet Document** reference type.

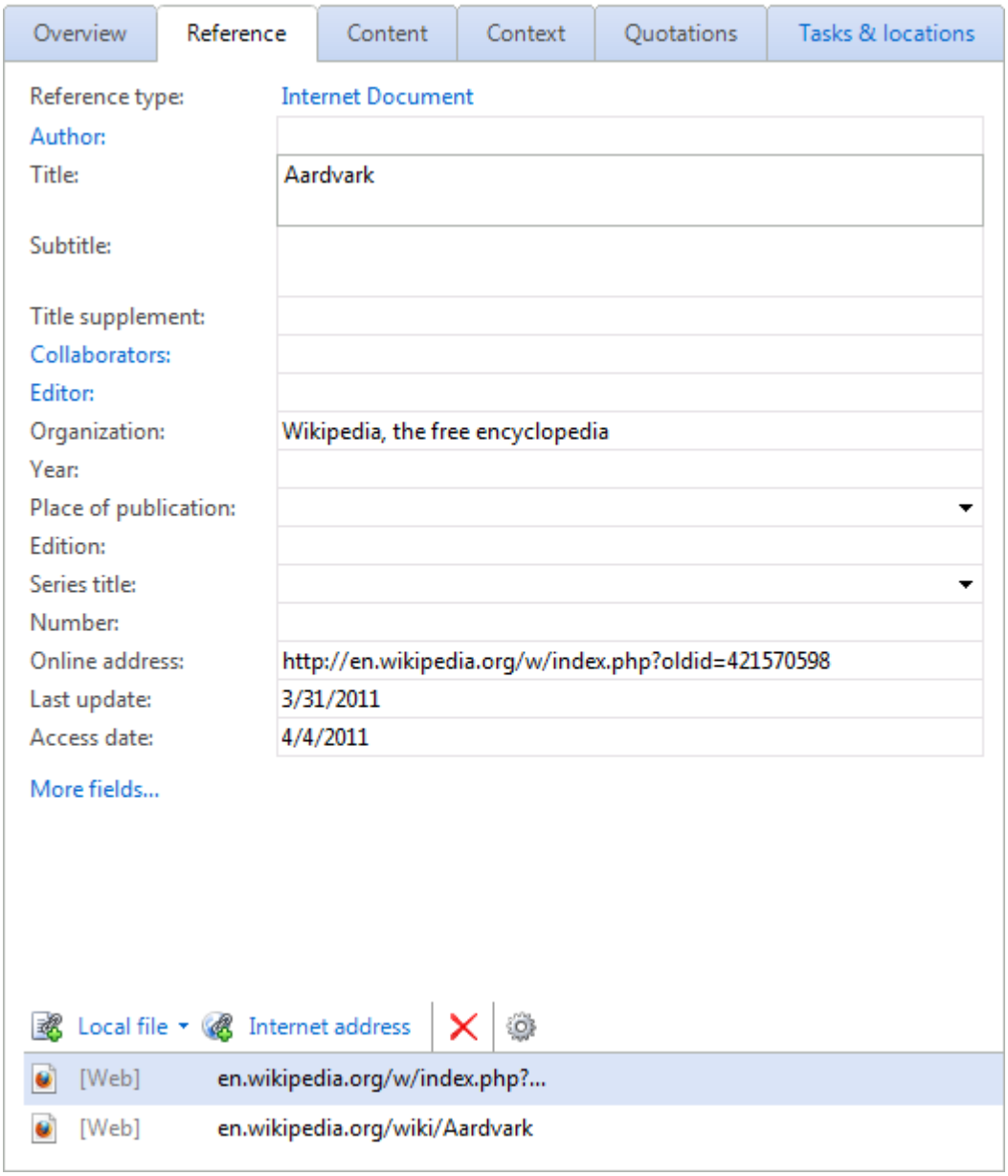
The following screenshot shows how to add a printed encyclopedia to Citavi:



The following screenshot shows how to add an article from a printed encyclopedia (see above) to Citavi:



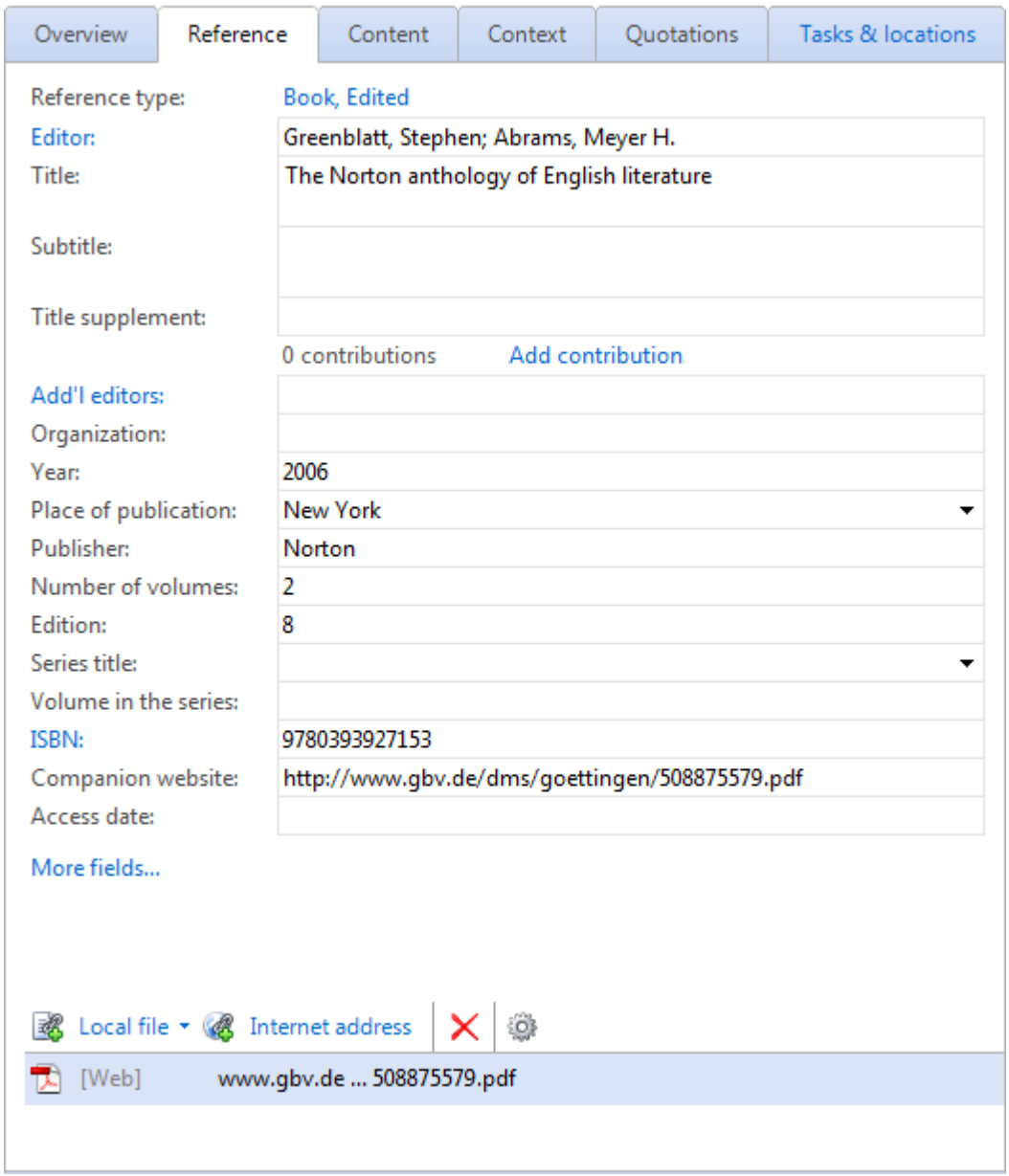
The following screenshot shows how to add an article from an online encyclopedia to Citavi:


Overview
Reference
Content
Context
Quotations
Tasks & locations
Reference type:
Internet Document
Author:
Title:
Aardvark
Subtitle:
Title supplement:
Collaborators:
Editor:
Organization:
Wikipedia, the free encyclopedia
Year:
Place of publication:
Edition:
Series title:
Number:
Online address:
http://en.wikipedia.org/w/index.php?oldid=421570598
Last update:
3/31/2011
Access date:
4/4/2011
More fields...
Local file
Internet address
[Web]
en.wikipedia.org/w/index.php?...
[Web]
en.wikipedia.org/wiki/Aardvark

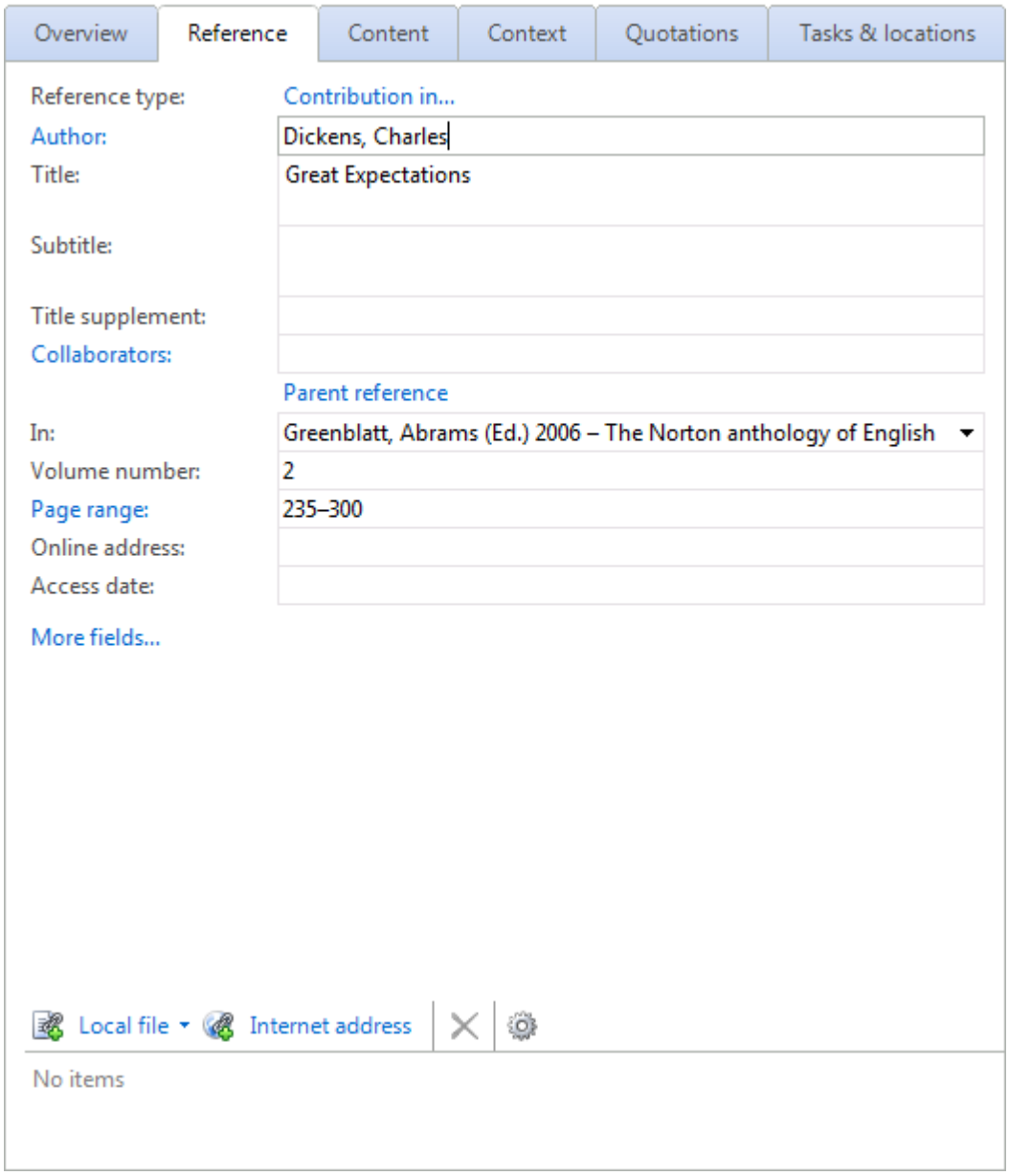
3.5.7 Adding a Multivolume Work

It is not easy to add multivolume works, and the contributions by various writers within them in, as the example below illustrates. Use the **Edited book** and **Contribution** reference types.

Below is an example of a multivolume work using the **Edited book** reference type:



Below is an example of how to add a contribution that appears in the second volume of the multivolume work above:



If the multivolume work has one single author (ex. the complete works of Shakespeare spanning several volumes), choose **Collected Work** instead of **Edited Book**. Parts of such a publication can also be recorded by using the **Contribution in** reference type.

4. Searching Online

Citavi helps you to fight information overload and save time while doing so. Instead of entering references by hand, you can search many library catalogs and databases from within Citavi, then add the search results to your project with just a click.

This chapter explains how to:

- Develop a search strategy
- Search Web-based databases and library catalogs

4.1 Developing a Search Strategy

Citavi helps you develop and implement a search strategy. You can search many high-quality information sources directly from within Citavi and refine your search strategy as you go.

In this chapter you will learn:

- What makes a good search strategy?
- Choosing Search Terms
- Choosing Information Sources

4.1.1 What Makes a Good Search Stategy?

Every search strategy must consider three things:

- **Where** to search.
- **How** often to search.
- **Which** search terms will best help me find the information I need?

Use Citavi to search in:

- **Library catalogs** for books you can lend from your institution's library or request through interlibrary loan.
- **Bookseller catalogs** for books you can purchase.
- **Databases** for journal articles, gray literature, contributions in edited books, and books.
- **Specialty search engines** (for example, Scirus) for journal articles.

Keep in mind that different resources are updated more or less frequently. A library catalog may changes less frequently than a specialty search engine, so repeat your searches accordingly.

4.1.2 Choosing Search Terms

Choosing the right search terms and joining them into a search query usually takes several steps.

The first search terms are found in the title, abstract, or jacket text, or among keywords already used by others in the field to describe the work. You may consider translating the search terms into other languages you know. Use these search terms to perform a search from within Citavi.

Too many results? Your search query may not be precise enough. Try to find additional or different search terms that may describe the subject more accurately. Take a look at relevant results from your first search and use their keywords or subject headings to perform a new search.

Too few results, or none at all? You may be searching with the wrong search terms or in the wrong places. Try using synonyms of your initial search terms and seek help from a librarian or other specialist for finding better information sources for your particular subject area.

Hint: Review the keywords imported with the search results from bibliographic databases or library catalogs. You may find useful search terms among them that will help you in future searches.

4.1.3 Choosing Online Resources

Today, you can search nearly every library catalog from your home or office. Citavi can access the online catalogs of many larger public and university libraries as well as special and research libraries. You can save your search results directly in Citavi and then use them to locate items you want to use.

Almost every academic discipline has its own database compiled by experts in the field. These databases are gold mines of information. For example, PubMed is one of the most significant research databases biomedical literature, while ERIC is one of the most important in the field of education.

Research portals such as CompletePlanet can give you an overview of interesting information sources.

Hint: Your library's website generally contains a section that tells you which research databases the library subscribes to. Often these databases will be grouped by academic discipline. Ask your library's subject specialists for information regarding the best databases for your topic.

4.2 Performing a Search

You can search over 4,000 online resources from within Citavi. This chapter covers how to:

- Search online resources from within Citavi
- Import results from Web-based resources

4.2.1 Searching from Citavi

This section covers:

- Simple and advanced search
- Selecting online resources
- Subscription databases
- Searching multiple online resources
- Saved searches
- Reviewing search results

4.2.1.1 Simple and Advanced Search

To search library catalogs and bibliographic databases, Citavi offers two kinds of online search: simple and advanced. Most of the time, the simple online search is all you need.

Simple online search lets you search **all fields** (which fields this includes varies by information provider). You can also search for a specific **author** or by **title**. You can also restrict the **year range**.

Advanced online search lets you search all available fields individually. You can enter search terms in multiple fields and group them with parentheses and operators. This option lets you create very precise searches.

Different information providers offer different search options. One might only offer search by keyword and author, while another offers a dozen fields. Some information providers permit wildcards (for example, `democra*` to find *democrat*, *democracy*, *democratic*, etc.) while others don't.

Performing a Simple Online Search

1. In the **Reference Editor**, click **Online search** in the toolbar.
2. Select the checkboxes for the information providers you want to search. If the one you want isn't listed, refer to Selecting Information Providers to add it.
3. Enter your search term.
   a. To find works on a subject, type keywords into the **All fields** field.
   b. To find the work of an author, type the name into the **Author** field.
   c. To restrict to a span of time, click to select the appropriate **Year range.**
4. Click **Search** to begin the search.
5. Select the checkboxes next to the search results you want to add to your project. If you want to add them all, you can skip this step.
6. Click **Add to project**. A dialog with options appears. Choose the appropriate options and click **OK**.
7. The search results are applied as a selection. When you are done, click **Cancel selection** to show all references.

Hint: Sometimes, an information provider may use a different reference type from Citavi. If you suspect that references you imported contain bibliographic information that is not being displayed, you can check by showing all fields. In the **Reference Editor**, on the **Reference** tab, click **More fields**. If you always want to see all the information available, select the **Show all non-empty fields on the Reference tab automatically** checkbox.

Performing an Advanced Online Search

1. In the **Reference Editor**, click **Online search**.
1. Select the checkboxes for the information providers you want to search. If the one you want isn't listed, refer to Selecting Information Providers to add it.
2. Click **Advanced online search**.
2. Select a field to search (for example, in PubMed, the **MeSH Terms** field) and type your search term (for example, `measles`).
3. Add more fields if necessary (for example, in PubMed, another **MeSH Terms** field for `disease outbreaks` and **Year** for `2010`).
4. Type parentheses and select Boolean operators (AND, NOT, or OR) to structure the search logic if necessary.
5. Click **Search** to begin the search.
6. Select the checkboxes next to the search results you want to add to your project. If you want to add them all, you can skip this step.
7. Click **Add to project**. A dialog with options appears. Choose the appropriate options and click **OK**.
8. The search results are applied as a selection. When you are done, click **Cancel selection** to show all references

Examples of Advanced Searches

- **PubMed**
  MeSH terms = `measles` **AND** MeSH terms = `disease outbreaks` **AND (**year = `2008` **OR** year = `2009` **OR** year = `2010`**)**

4.2.1.2 Selecting Information Providers

Bibliographic databases and library catalogs are two of the most important resources you can use to search for for scholarly information.

To get started, we recommend adding the following online resources:

- Your **university** or **public library** to search for books you want to borrow.
- A large **shared catalog** or **national library catalog** such as WorldCat, the Library of Congress, or the British Library. This type of catalog helps you discover what books have been published on a given topic. Obtaining the book is not necessarily the primary goal.
- **Bibliographic databases** (also known as research databases) that are pertinent to your subject matter and that your university or company has subscribed to. (Visit your library's website for more information.) These help you find relevant articles in scholarly journals and contributions in edited books and conference proceedings.

Selecting Online Resources for Online Search

1. In the **Reference Editor**, click **Online search**.
2. Click **Add database or catalog**.
3. Use the search fields to narrow the list of online resources:
   a. If you know the name, enter it in the **Name** field.
   b. To restrict the list to databases from a specific information provider, select it from the **Provider** menu.
   c. To restrict to a country, select it from the **Country** menu.
   d. To restrict to a subject area, select it from the **Subject** area menu.
4. Select the checkboxes of the online resources you want to add, then click **Add**.
5. Click **Close** to return to the online search window.

Hint: If the online resource you are looking for isn't available in Citavi, you can suggest it on our website.

Removing an Online Resource

1. In the **Reference Editor**, click **Online search**.
2. Click the name of the online resource you want to remove.
3. Click **Remove** in the toolbar.

4.2.1.3 Subscription Databases

Many bibliographic databases are restricted to subscribers. Colleges, universities, companies and other organizations buy subscriptions to provide their users access to subscription databases. User authentication is used to verify that you are entitled to access.

Finding Subscribed Databases

If you're connected to a corporate or university network, Citavi can automatically detect many subscription databases your organization has subscribed to. If you're away from the campus network, you can often connect to the network remotely using a Virtual Private Network (VPN). Ask your network administrator if VPN access is available.

1. In the **Reference Editor**, click **Online search**.
2. Click **Autodetect subscribed databases**.

Searching a Subscription Database

1. In the **Reference Editor**, click **Online search** in the toolbar. If necessary, add the online resource. See: Selecting online resources.
2. Select a subscription database and enter your search query.
3. The first time you search a subscription database, you will be asked to authenticate:
   a. **IP address:** If you are a member of an organization that has subscribed to the database you are accessing, and you are connected to the organization's network, first see if you can authenticate by IP address. Click **Test** to try.

b. **Username and password:** In other cases, a database requires a username and password (and sometimes organization) login to authenticate. Ask the appropriate person — typically a librarian — at your organization for the login information and enter it here.

4. Citavi Pro and Citavi Team users can select **Remember** to save the login credentials for future searches. Citavi Free users must enter the login credentials manually after every time Citavi is exited.

Note: Web searches of bibliographic databases are generally limited to IP address authentication. Citavi uses an alternative method, the Z39.50 protocol. When using Z39.50, many providers of subscription databases expect a username and password instead of, or in addition to, IP address authentication.

Removing or Changing Saved Login Credentials

If you made a typo in a username or password, you can enter the credentials again or delete them:

1. On the **Tools** menu, click **Options**.
2. On the **Search** tab, click **Edit credentials for subscription databases**.
3. Select the database credentials you want to remove or change and then click **Remove** or **Change**.

4.2.1.4 Searching Multiple Online Resources

You can save time by searching multiple online resources at once. It is, however, important to understand the limitations of doing so, because different providers have different capabilities.

As soon as you select multiple online resources, Citavi determines which search fields and options the selected online resources have in common. Citavi then presents only the fields and options that will work for *all* the selected resources, which may be significantly fewer than an online resource offers when selected by itself. If you need to perform complex searches involving truncation and operators, you may need to search each online resource individually.

4.2.1.5 Saved Searches

Citavi lets you save searches so you can reuse the same search query easily. This is especially handy if you have built a complex search.

Saving a Search

1. In the **Reference Editor**, click **Online search**.
2. Build your search query.
3. Click **Save search**.
4. Enter a name for the saved search and click **OK** to finish.

Important: To create a new saved search, always start with a freshly-opened online search window, not one with a previous saved search open.

Using a Saved Search

1. In the **Reference Editor**, click **Online search**.
2. Click **Saved searches**, then click the search you want to use.
3. Click **Search** to run the search.

Editing a Saved Search

1. In the **Reference Editor**, click **Online search**.
2. Click **Saved searches**, then click the search you want to edit.
3. Make the changes to the search.
4. Click **Save search**.

Deleting a Saved Search

1. In the **Reference Editor**, click **Online search**.
2. Click **Saved searches**, then click **Manage saved searches**.
3. Click the search you want to remove, then click **Delete**.

4.2.1.6 Reviewing Search Results

When an online search returns a lot of results, you usually only want to keep the best ones. You can either clear the checkboxes for the unwanted results in the search results window so they are not added to the project, or you can add them to the project and review them later.

With large sets of search results, we recommend adding all results to the project for later review. Citavi automatically applies the search results as a **selection**. Now you can browse just the new references, remove unwanted ones, and mark interesting ones, for example by applying a label or adding tasks to them.

You may not always have time to review the results right away. In these cases, it makes sense to add **Examine and assess** tasks to the references you just added. Then you can review the new references at your leisure.

Adding Tasks to a Set of Search Results

1. Perform your online search and add the results to the project. Citavi applies the results as a selection.
2. Press **Ctrl+A** to select all the results.
3. On the **References** menu, point to **Batch modify**, and then click **Add task**.
4. Select a task, for example **Examine and assess** and select any other options, then click **OK**.
5. Click **Cancel selection** to cancel the selection and show all the references in the project.

Hint: Use **Batch modify** to apply keywords to search results. For example, you can apply the search term as a keyword.

4.2.2 Searching Web Resources and Importing Search Results

Some of the online resources in Citavi can also be searched through a Web browser. Additionally, there are online resources that cannot be added to Citavi for legal or technical reasons. However, many Web-based online resources allow you to export your results directly to a reference management program. The name of the feature varies by database: **Save to Reference Software**, **Export to Citation Manager**, **Download Selected Citations**, and **Import to EndNote** are just some examples. In all of these cases, you can export your search results into Citavi.

Citavi includes import filters for standard formats — RIS, BibTeX, and ENW (EndNote Tagged) — as well as custom import filters tailored to many individual online resources.

This section covers how to:

- Import references in a standard format (RIS, BibTeX, and ENW)
- Import references in nonstandard formats

4.2.2.1 Importing References in a Standard Format

Standard formats include RIS, BibTeX, and EndNote Tagged. The following example illustrates the process of using RIS to import from Scirus. For steps 2–5, the actual steps will vary slightly by database.

Exporting Search Results into a Citavi Project

1. Conduct your search.
2. Select the pertinent references.
3. Click **Export Checked Results**.

4. Choose whether to export only the basic information ("citations only"), or to include abstracts and keywords.
5. Select **Save file to disk or open Reference Software** and click **Export**.
6. The RIS file is created and downloaded to your computer. Your Web browser will ask whether you want to open the file or save it. Click **Open**.
7. If it is not open already, Citavi starts. A list of your Citavi projects appears. Select the project you want to import the search results into and then click **OK**.
8. If asked, set the order of first and last names, then click **Next**.
9. Select the checkboxes next to the search results you want to add to your project. If you want to add them all, you can skip this step.
10. Click **Add to Project**. Select the additional information you want to include and then click **OK**.

Notes: Citavi can import a file downloaded through a Web browser automatically if it has one of the following file extensions: .ris, .ovd, .bib, or .enw. Automatic import will not work if the online database uses another extension such as .asp or .txt. Citavi cannot register those extensions because they are generic. For files with those extensions, as well as when running Citavi from a USB flash drive, download the search results file to your computer and begin the import manually. To start an import manually, in the **Reference Editor**, on the **File** menu, click **Import**.

4.2.2.2 Importing References in a Nonstandard Format

At first glance, some online resources appear to offer search result downloads in a standard format. After unsuccessfully trying to import the file, you may find that the data in the file does not conform to the standard. In that case, you must use a custom import filter.

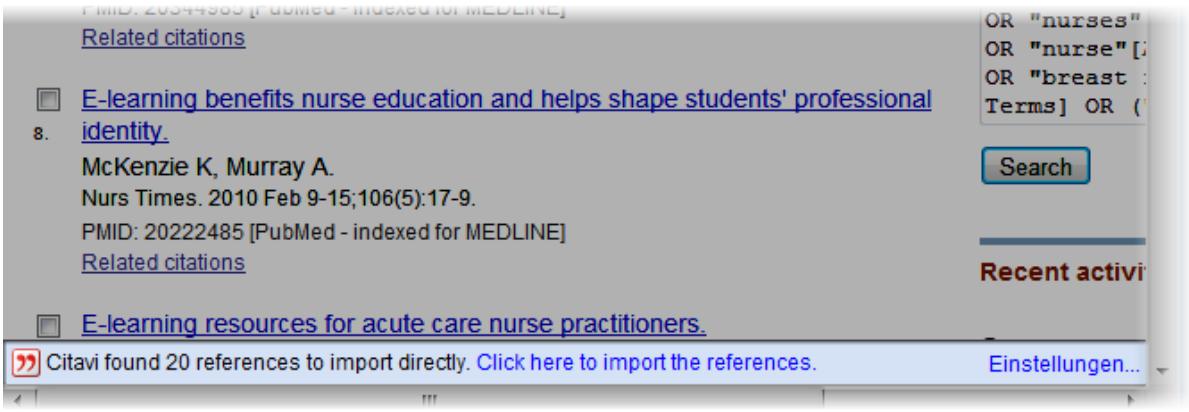
Importing Search Results in Nonstandard Formats

1. Conduct your search.
2. Save the search results file to your computer.
3. On the **File** menu, click **Import** and then select **Text file** and then click **Next**.
4. Select the appropriate import filter. If you can't find the one you need, click **Add import filter**.
5. If you want, use the search fields to narrow the list of import filters:
   a. To quickly narrow the list, type the name of the information provider in the **Name** field.
   b. To restrict to a subject area, select it from the **Subject area** menu.
   Can't find an import filter for your information provider in Citavi? Send us an e-mail to let us know.
6. Select the checkbox for the import filter, then click **Add**.
7. Select the import filter you want to use, then click **Next**.
8. Select the downloaded search results file and then click **Next**.
9. Select the checkboxes next to the search results you want to add to your project. If you want to add them all, you can skip this step.
10. Click **Add to project**. A dialog with options will appear. Choose the appropriate options and click **OK**.

Hint: On rare occasions, an online resource may offer export to a standard format, but when importing to Citavi, the results are unsatisfactory. If you open the exported search results in a text editor and compare it to the standards for the format, you may find that there are minor deviations from the standard, such as differing structure or missing fields. We suggest that you contact the online resource and let them know — they are usually eager to fix problems.

4.2.2.3 Importing with Pickers

The free Citavi Picker extensions for Internet Explorer and Firefox can often help you import search results. For certain online resources, the Picker's **Hunter** feature can alert you to references that can then be imported with just a click.


Related citations
E-learning benefits nurse education and helps shape students' professional identity.
8.
McKenzie K, Murray A.
Nurs Times. 2010 Feb 9-15;106(5):17-9.
PMID: 20222485 [PubMed - indexed for MEDLINE]
Related citations
E-learning resources for acute care nurse practitioners.
Citavi found 20 references to import directly. Click here to import the references.
Einstellungen...
Search
Recent activi

Importing Search Results with the Picker

1. Make sure Citavi is running.
2. Perform your search in the online database.
3. On the results page, the Hunter detects references to import. Click **Click here to import the references**.
4. A dialog appears. Select the checkboxes for the references you want to import and click **Import**.
5. The results are added to your project and applied as a selection. To see the remaining references in the project, click **Cancel selection**.

5. Working with Citavi Pickers

Citavi Pickers help you work with Web pages and PDF files:

- With a couple clicks you can add a Web page or PDF file to Citavi as a new reference
- You can highlight text and save it as a quotation (or an abstract or table of contents) and the citation information will be automatically added as well.
- Images can be saved with a click, either as an image quotation or a cover
- References you find online can easily be added to your Citavi project with the Pickers

In this chapter you will learn about:

- Picker features for Internet Explorer and Mozilla Firefox
- Picker features for Adobe Reader and Acrobat

5.1 Pickers for Firefox and Internet Explorer

Pickers are available for Firefox and Internet Explorer. Your browser must have JavaScript enabled. The Picker does not support 64-bit Internet Explorer. Use the default (32-bit) version of Internet Explorer.

The Pickers can either be installed at the same time as Citavi or later under **Help** > **Install or remove Citavi Pickers**.

Picker Features

Copying and saving

- Add an internet document to a Citavi project
- Save a screenshot of an internet document
- Copy text and its URL to the Clipboard
- Add a quotation
- Save an image as an image quotation or cover

Searching and retrieving

- Find reference information through an ISBN search
- Find bibliographic information through a text search
- Import search results with just a click

5.1.1 Adding an Internet Document

Perhaps you have found a Web page that you want to add to Citavi. How do you add it? First, make sure that no text or graphics on the page are highlighted. Then, right-click on the page, point to **Citavi Picker**, and then click **Add Web page as reference**.

The Citavi Picker will add the metadata from the Web page and save it in Citavi. In many cases, you will have to go back and correct the information or add additional information manually, since not all Web pages contain accurate metadata.

Often the modification date given by dynamically-generated Web pages is incorrect. In many cases, the date shown is today's date, not the last time the content was changed. If the same date appears in the **Last update** and **Access date** fields in Citavi, you may want to verify the modification date yourself — it usually can be found in the footer of the Web page.

5.1.2 Saving Screenshots

A Web page's contents may change frequently. By taking a "snapshot" of a Web page, you can save a copy in Citavi as the **Cover art** for the corresponding Internet document.

Make sure that no text or image is highlighted, the right-click the page, point to **Citavi Picker** and click **screen as screenshot**. To obtain a readable screenshot, you can then choose **Image of the current window** (and first resize the screen to the desired size).

5.1.3 Copying Text with its URL

You may not always want to save a Web page as a reference in Citavi. If you still want to save a quotation from a Web page with its source information (i.e. with the URL), highlight it, then right-click the page, point to **Citavi Picker** and then click **Copy selection and URL to Clipboard**. Switch to the application you want to use (for example, a thought in Citavi, your word processor, or your email program) and then paste the text and its source.

5.1.4 Adding a Quotation

If you have not already added the Web page to Citavi, you can add it and the quotation in one step. Highlight the text that you want to save, then right-click the page, point to **Citavi Picker**, point to **Add reference and add selection** and then click **as quotation**, **as abstract**, etc. The Web page is added as a reference and the quotation is added to it.

To add a quotation to the current reference, on the Web page, highlight the text that you want to save in Citavi. Then right-click the page, point to **Citavi Picker**, then click **Add selection as quotation**, **as abstract**, etc.

5.1.5 Saving Images

Right-click the image that you want to save in Citavi, point to **Citavi Picker**, then click **Add selection as image quotation** or **as cover art**. The image is added to the current reference.

If you want to save both the image and its Web page at the same time, right-click the image, point to **Citavi Picker**, point to **Add reference and add selection** and then click **as image quotation** or **as cover art**.

5.1.6 Finding Reference Information by ISBN

The Picker icon automatically appears after every ISBN number it finds on a Web page. This works both for 10-digit and 13-digit ISBN numbers as long as you have not deactivated this feature on the **Citavi Picker** item of the right-click menu under **Settings** > **General**.

When you click the Picker icon, the Picker searches for the book's bibliographic information and saves it in your Citavi project. The Picker searches the databases that you have selected in Citavi under **Options** > **Search** > **ISBN download**.

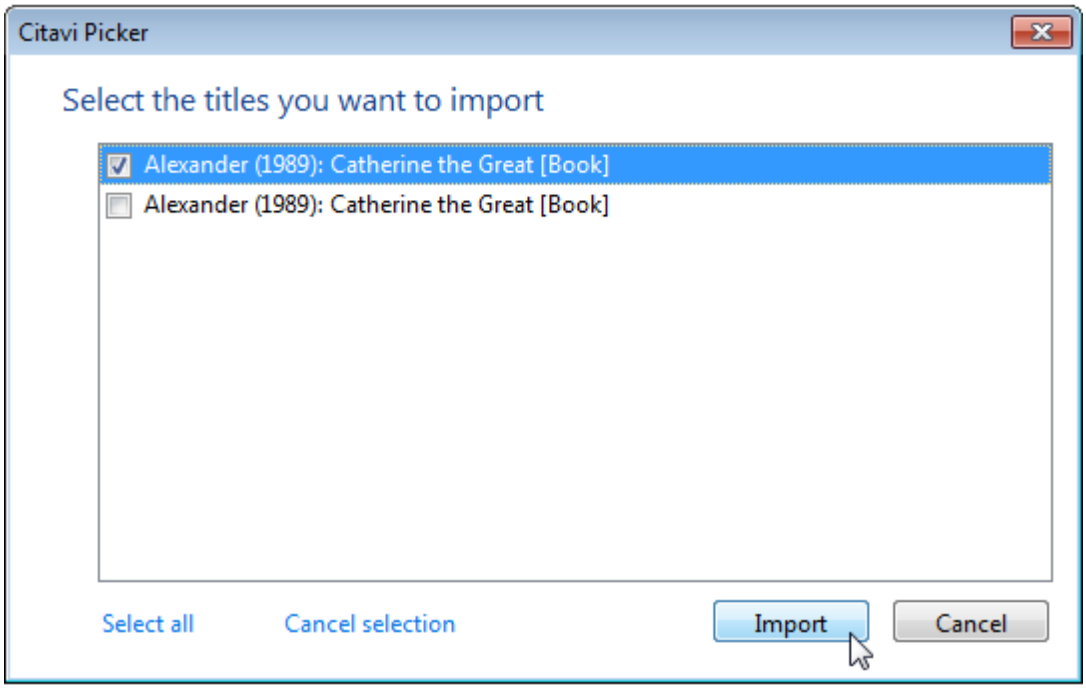
Sometimes no bibliographic information is found. Often, this is because the databases selected for online search do not have any information on the item. Another cause is incorrect ISBN numbers on the Web page. If the ISBN number is incorrect, the Picker will either find nothing at all, or information for a different book.

Hint: If you have a long list of ISBN numbers, you do not need to add references one by one. Copy the whole list to the Clipboard. Open Citavi and click **Retrieve by ISBN** and then select **Text from Clipboard**. Citavi extracts the ISBN numbers from the text and adds the references to your project.

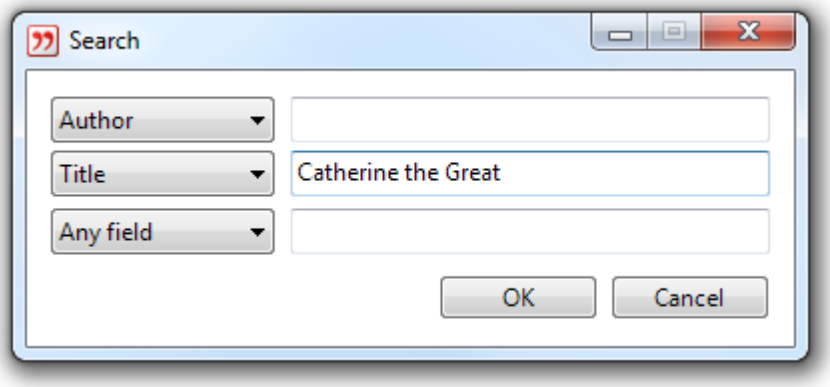
5.1.7 Searching Databases with the Picker

If you come across a Web page containing ISBN numbers, the best way to add the bibliographic information to your project is to follow the instructions in the chapter Finding Reference Information by ISBN. Even if there are no ISBN numbers, you can use the Picker to add bibliographic information to your project. Highlight the author names or parts of the book's title that are as specific as possible (for example, "Systematic Knowledge Management" is more specific than "Knowledge Management"). You then can choose between **Quick Search** and **Advanced Search**.

For a quick search, point to **Search databases for references** and then click **Quick search for "*selected text*"**. Citavi searches the online resources that you have chosen for the Online Search feature in Citavi. A results list appears to let you select the correct reference and import it to your project.



For an advanced search, point to **Search databases for references** and then click **Advanced search**. You can then correct or add to the search terms. Start the search by clicking **OK**. Citavi searches the online resources that you have chosen for the Online Search feature in Citavi.

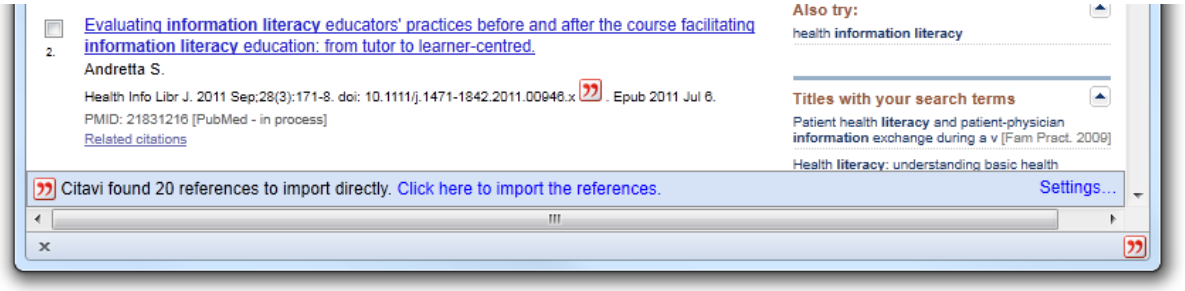


5.1.8 Starting a Search with the Picker

If you come across an online bibliography that you want to evaluate, you can use the Picker to add individual references to your Citavi project. To do so, highlight the author names or significant parts of the title (for example, "Systematic Knowledge Management" is better than "Knowledge Management"). Then right-click the page, point to **Citavi Picker**, point to **Search databases for reference** and then click **Quick search** or **Advanced search**.

5.1.9 Importing Search Results with a Click

More and more library catalogs are offering their search results using **COinS**, which allows for easy import into reference management programs. COinS hides the bibliographic information in the HTML code of a Web page. Under normal circumstances, you never know it is there (unless you view the source code of the page). The Picker can detect COinS, extract the bibliographic information from them, and offer to add the references to your project.


2.
Evaluating information literacy educators' practices before and after the course facilitating information literacy education: from tutor to learner-centred.
Andretta S.
Health Info Libr J. 2011 Sep;28(3):171-8. doi: 10.1111/j.1471-1842.2011.00946.x . Epub 2011 Jul 6.
PMID: 21831216 [PubMed - in process]
Related citations
Also try:
health information literacy
Titles with your search terms
Patient health literacy and patient-physician information exchange during a v [Fam Pract. 2009]
Health literacy: understanding basic health
Citavi found 20 references to import directly. Click here to import the references.
Settings...

Similarly, you can also add data from other information providers that do not use COinS. The Citavi Picker recognizes data from important online research databases and uses a "Hunter" to seek out reference information. Examples include library catalogs that use OCLC or Aleph systems; databases from EBSCO and OvidSP, as well as PubMed, Google Scholar, CiteULike and more. When references are detected, you can easily add them to your Citavi project using the Picker.

5.2 Picker for Adobe Reader and Acrobat

The Picker works with Adobe Reader and Adobe Acrobat (versions 8 and later). It does not support any other PDF readers.

The Pickers can either be installed at the same time as Citavi or later under **Help** > **Install or remove Citavi Pickers**.

Picker Features

- Add a PDF file to a Citavi project
- Save text as a quotation, abstract, table of contents, or keyword
- Save an image as an image quotation or cover
- Find bibliographic information through a text search

5.2.1 Adding PDF Files

To add only the bibliographic information from a PDF file to your Citavi project, first make sure that no text or graphics on the page are highlighted. Then, right-click on the page, point to **Citavi Picker** and click **Add PDF as reference**.

The Citavi Picker retrieves the reference information from the properties of the PDF file (which you can view under **File** > **Properties**) and saves it in Citavi. In many cases, you may have to go back and correct the information or add additional information manually, since not all PDF files contain accurate author and title information.

You can also save a copy of the PDF file. When you add the reference, Citavi asks if you want to save a local copy of the file. If yes, you can choose a location to save the file. Citavi automatically adds the file path as a **Local file**, so that you can access the copy from Citavi at any time.

Of course, you can also add a copy of the PDF file to an existing reference later on. Select the reference in Citavi and view the PDF file in the Preview pane. To save the file, click the yellow ribbon that appears above the PDF file.

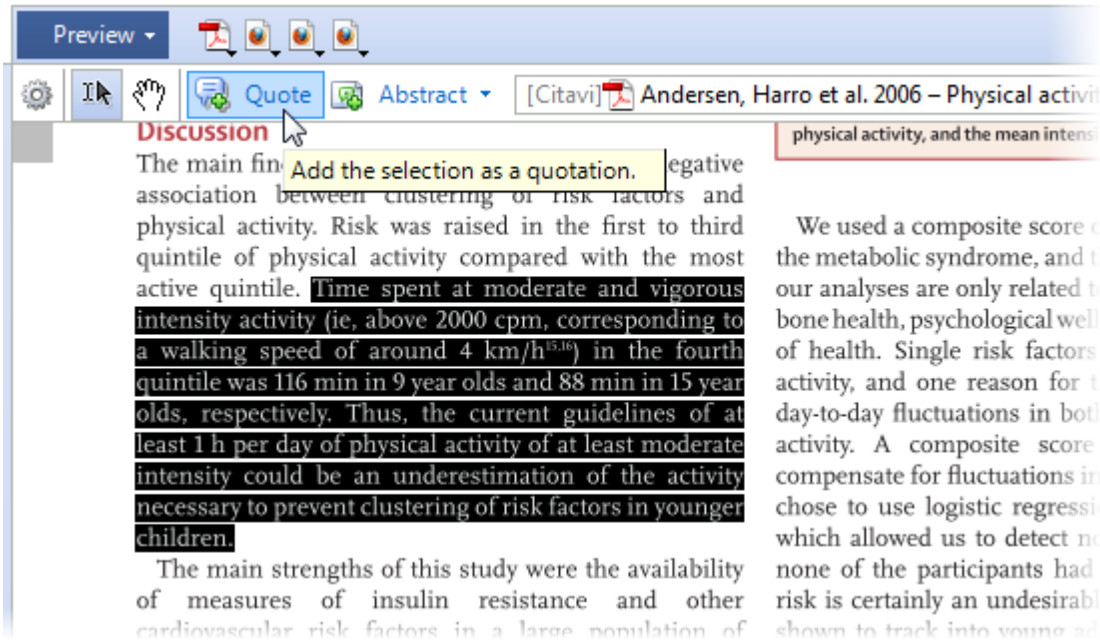
Preview
Quote
Abstract
[Web] http://www.nature.com/mp/journal/v16/n3/pdf/mp201
Click here to save a copy of this document into the Citavi project
Open
Molecular Psychiatry (2011) 16, 265–272
© 2011 Macmillan Publishers Limited All rights reserved 1359-4184/11
www.nature.com/mp
ORIGINAL ARTICLE
Long-term body weight outcomes of antidepressant–environment interactions
C Mastronardi[1], GJ Paz-Filho[1], E Valdez[2], J Maestre-Mesa[2], J Licinio[1] and M-L Wong[1]
[1]John Curtin School of Medical Research, Australian National University, Canberra, ACT, Australia and
[2]University of Miami Miller School of Medicine, Miami, FL, USA
Both obesity rates and antidepressant use have escalated in the last 20 years. Most people
who start antidepressant treatment discontinue it on their own. Meanwhile, obesity rates

5.2.2 Saving Text as a Quotation

Highlight the desired text in the PDF file. Then, point to **Citavi Picker** and click **Add selection as quotation**. The text will automatically be added to the current reference.

To save the quotation and the PDF file at the same time, point to **Citavi Picker**, point to **Add reference and add selection**, and then click **as quotation**, **as abstract**, etc. The file is added as a reference and the quotation is added to the created reference at the same time.

You can easily work with PDFs using Citavi's Preview pane. The most important commands for excerpting quotations and abstracts can be found in the toolbar:


Preview
Quote
Abstract
[Citavi] Andersen, Harro et al. 2006 – Physical activi
Discussion
Add the selection as a quotation.
physical activity, and the mean inten
The main fin egative association between clustering of risk factors and physical activity. Risk was raised in the first to third quintile of physical activity compared with the most active quintile. Time spent at moderate and vigorous intensity activity (ie, above 2000 cpm, corresponding to a walking speed of around 4 km/h[15,16]) in the fourth quintile was 116 min in 9 year olds and 88 min in 15 year olds, respectively. Thus, the current guidelines of at least 1 h per day of physical activity of at least moderate intensity could be an underestimation of the activity necessary to prevent clustering of risk factors in younger children.
The main strengths of this study were the availability of measures of insulin resistance and other cardiovascular risk factors in a large population of
We used a composite score the metabolic syndrome, and our analyses are only related bone health, psychological wel of health. Single risk factors activity, and one reason for day-to-day fluctuations in bot activity. A composite score compensate for fluctuations i chose to use logistic regressi which allowed us to detect n none of the participants had risk is certainly an undesirab shown to track into young ad

Hint: You've probably noticed that unwanted line breaks sometimes appear when you copy and paste text from PDFs. You can easily correct this in Citavi. After you have added a quotation or abstract, open it, then right-click the text and click **Remove paragraphs and tabs**.

5.2.3 Saving Images

Left-click to highlight the image that you want to save in Citavi. Then point to **Citavi Picker**, and click **Save selection as image quotation** or **as cover art**. The image will automatically be saved to the current reference.

If you want to save both the image and its Web page at the same time, point to **Citavi Picker**, click **Add PDF document and save selection** > **as image quotation** or **as cover art**.

5.2.4 Searching Databases with the Picker for Adobe

To perform a search from a PDF document, follow the same steps as for the Pickers for Firefox and Internet Explorer.

6. Importing and Exporting

This chapter covers:

- Importing from another reference management program
- Importing from a text file
- Exporting from one Citavi project to another
- Exporting to another reference management program

6.1 Importing from Other Reference Management Programs

You may find that you need to import large amounts of reference data into Citavi. Citavi lets you import from many reference management programs.

You may find that Citavi appears to import more references than expected. For example, you might import a project with 98 references and find 115 in Citavi. This is not an error, but a difference in how Citavi stores related references. Citavi differentiates between parent and child references and divides them into different reference types (for example, **Contribution in** an **Edited book**). Many reference management programs do not make this distinction, so when you import a file from them, Citavi does this for you. The result is that 98 references in one program can become 115 in Citavi.

Unlike Citavi, some reference management programs save names of persons "whole", that is, without separating them into first, middle, and last names. When importing, Citavi checks names and splits them into their component parts. Be sure to check names after an import to make sure they were transferred correctly.

6.1.1 Importing from Bibliographix

Citavi can import databases from Bibliographix up to version 6.1.

Importing a Bibliographix Database

1. In the **Reference Editor**, on the **File** menu, click **Import**.
2. Select **Another reference management program** and click **Next**.
3. Click **Add filter**, select **Bibliographix** and then click **Add.**
4. Select **Bibliographix** and click **Next**.
5. Click **Browse** and select the file you want to import, then click **Next**.
6. In the Import window that appears, you can choose which references you want to import. To import all the references, click **Add to project**. To add specific references only, first select the corresponding checkboxes and then click **Add to project**.
7. Select any appropriate import options and click **OK** to complete the import.

6.1.2 Importing from Biblioscape

Citavi can import databases from Biblioscape 7.

Importing a Biblioscape Database

1. In the **Reference Editor**, on the **File** menu, click **Import**.
2. Select **Another reference management program** and click **Next**.
3. Click **Add filter**, select **Biblioscape** and then click **Add.**
4. Select **Biblioscape** and click **Next**.
5. Click **Browse** and select the file you want to import, then click **Next**.
6. In the Import window that appears, you can choose which references you want to import. To import all the references, click **Add to project**. To add specific references only, first select the corresponding checkboxes and then click **Add to project**.
7. Select any appropriate import options and click **OK** to complete the import.

6.1.3 Importing from EndNote

Citavi can import libraries from Endnote version 8 and later. Some reference types (for example, Hearing) are not available in Citavi. Any references without a corresponding reference type will be be given the Unknown reference type.

Importing an EndNote Library

1. In the **Reference Editor**, on the **File** menu, click **Import**.
2. Select **Another reference management program** and click **Next**.
3. Click **Add filter**, select **EndNote** and then click **Add.**
4. Select **EndNote** and click **Next**.
5. Click **Browse** and select the file you want to import, then click **Next**.
6. In the Import window that appears, you can choose which references you want to import. To import all the references, click **Add to project**. To add specific references only, first select the corresponding checkboxes and then click **Add to project**.
7. Select any appropriate import options and click **OK** to complete the import.

Note: In rare cases, the import will either not complete or after the import Citavi will show that the EndNote library did not contain any data. To import the database, start EndNote, but do not open any library. Then, on the **Tools** menu, click **Recover Library**. Select the EndNote library and click **Open**. EndNote repairs the library and saves it with a new name. Import this file into Citavi following the steps above.

Mapping of Reference Types

Citavi has most of the same reference types used in EndNote, and several more.

Citavi	EndNote (direct)	EndNote (indirect)
News Agency Report		
File		
Archive Material		
Contribution in Legal		

Citavi	EndNote (direct)	EndNote (indirect)
Commentary		
Contribution	Book Section	Conference Paper
Map	Map	
Court Decision		
Statute or Regulation	Statute	
Legal Commentary		
Unpublished Work	Report	
Thesis	Thesis	
Audio Book		
Radio Play		
Internet Document	Electronic Source	Online Database Online Multimedia
Interview Material		
Manuscript	Manuscript	
Book	Book	Electronic Book
Music Track in…		
Musical Work/Music Album		
Standard		
Patent	Patent	
Personal communication	Personal Communication	
Press Release		
Radio or TV Broadcast		
Book, edited	Edited Book	
Software	Computer Program	
Special Issue		
Movie	Film or Broadcast	

Citavi	EndNote (direct)	EndNote (indirect)
Conference Proceedings	Conference Proceedings	
Audio, Video, or Film Document	Audiovisual Material	
Unknown	Generic	
Lecture		
Collected Work	Classical Work	
Journal Article	Journal Article Magazine Article	
Newspaper Article	Newspaper Article	
Unknown		Artwork Bill Case Hearing Figure Chart or Table Equation Electronic Journal Government Report/Document Legal Rule/Regulation

Note: In the table above, "indirect" means that Citavi saves the EndNote reference type under a different name. EndNote reference types that Citavi does not recognize are saved as the Unknown reference type in Citavi.

EndNote groups are imported into Citavi as categories.

The following EndNote fields are imported to the Notes field in Citavi: Author Address, Caption, Label, Reprint Edition, Research Notes, Section, Translated Author, Type of Work/Article (except for a Thesis references), Database Provider

6.1.4 Importing from LIDOS

Citavi can import databases from LIDOS 4 and 6.

Importing a LIDOS Database

1. In LIDOS, create an export file (LIDOS export with field selection). You may need to set the LIDOS export options to ensure that diacritics are exported correctly (select ANSI encoding).
2. In the **Reference Editor**, on the **File** menu, click **Import**.
3. Select **Another reference management program** and click **Next**.
4. Click **Add filter**, select either **LIDOS 4 (via Export)** or **LIDOS 6 (via Export)** and click **Add.**
5. Select **LIDOS 4 (via Export)** or **LIDOS 6 (via Export)** and click **Next**.
6. Click **Browse** and select the export file you created in step 1, then click **Next**.

7. In the Import window that appears, you can choose which references you want to import. To import all the references, click **Add to project**. To add specific references only, first select the corresponding checkboxes and then click **Add to project**.
8. Select any appropriate import options and click **OK** to complete the import.

Hint: By default, the newly imported references are applied as a selection. To see all the references in the project, click Cancel selection in the status bar.

6.1.5 Importing from ProCite

Citavi can import databases from ProCite 5.

Importing a ProCite Database

1. In the **Reference Editor**, on the **File** menu, click **Import**.
2. Select **Another reference management program** and click **Next**.
3. Click **Add filter**, select **ProCite 5** and then click **Add.**
4. Select **ProCite 5** and click **Next**.
5. Click **Browse** and select the file you want to import, then click **Next**.
6. In the Import window that appears, you can choose which references you want to import. To import all the references, click **Add to project**. To add specific references only, first select the corresponding checkboxes and then click **Add to project**.
7. Select any appropriate import options and click **OK** to complete the import.

6.1.6 Importing from Reference Manager

Citavi can import databases from Reference Manager.

Importing a Reference Manager Database

1. In Reference Manager, on the **File** menu, click **Export**.
2. Select **RIS** as the output format.
3. Start Citavi.
4. In the **Reference Editor**, on the **File** menu, click **Import**.
5. Select **Another reference management program** and click **Next**.
6. Click **Add filter**, select **Reference Manager (via RIS Export)**, and then click **Add.**
7. Click **Next**.
8. Click **Browse**, select the RIS file you want to import, and then click **Next**.
9. In the Import window that appears, you can choose which references you want to import. To import all the references, click **Add to project**. To add specific references only, first select the corresponding checkboxes and then click **Add to project**.
10. Select any appropriate import options and click **OK** to complete the import.

6.1.7 Importing from Zotero

Citavi can import information from Zotero indirectly. In Zotero, export your information to RIS format, then import the RIS file to Citavi.

6.2 Importing Text Files

The easiest way to import and export bibliographic information is if the data is a in a bibliographic format. However, even if the data is in some other structured format, it can be imported into Citavi. In some cases you can even import an existing list of references in a Word or PDF document.

This chapter covers how to:

- Import BibTex files
- Import RIS files
- Import EndNote Tagged files

6.2.1 Importing a BibTeX File

Citavi can import and export bibliographic information in BibTeX format. A typical BibTeX entry looks like this:

```
@book{Handke.2006,
  year = {2006},
  title = {The virtual linguistics campus:  Strategies and concepts for
successful e-learning},
  address = {M\"unster},
  publisher = {Waxmann},
  isbn = {978-3-8309-1689-5},
  editor = {Handke, J\"urgen and Franke, Peter}
}
```

Importing a BibTeX File

- Many web-based databases support direct export to Citavi. See Searching Web-Based Databases and Importing Search Results for more information.
- If you have a BibTeX file (with the .bib file extension) on your computer already, double-click it to start the import or drag it into the navigation pane in the **Reference Editor**.

Field Mapping

When you import a BibTeX file to Citavi, the fields are mapped as follows:

BibTeX	Citavi Generic
author	Authors
year	Year
title	Title1
editor	Editors
booktitle	Title2; ParentReference
address	PlacePublished
publisher	Publishers

BibTeX	Citavi Generic
volume	Volume
number	Number
series	SeriesTitle
edition	Edition
journal	Journal
isbn	ISBN/ISSN
keywords	Keywords
abstract	Abstract
note	Notes
url	OnlineAddress1
pages	PageRange

6.2.2 Importing a RIS File

Many Web-based resources offer bibliographic information export in RIS format.

A typical RIS entry looks like this:

```
TY  - BOOK
T1  - The virtual linguistics campus
SN  - 978-3-8309-1689-5
T2  - Strategies and concepts for successful e-learning
KW  -
PB  - Waxmann
PY  - 2006
CY  - Münster
A2  - Handke, Jürgen
A2  - Franke, Peter
ER  -
```

Tags consisting of a two-letter field code, two spaces, a hyphen, and one space are followed by the contents of the fields.

Importing a RIS File

- Many web-based databases support direct export to Citavi. See Searching Web-Based Databases and Importing Search Results for more information.
- If you have a RIS file (with the .ris file extension) on your computer already, double-click it to start the import or drag it into the navigation pane in the **Reference Editor**.

Reference Type Mapping

The reference types supported in RIS format differ to some degree from the ones available in Citavi. This overview shows the mapping of reference types when importing from RIS format:

RIS Reference Type Code	RIS Reference Type Name	Citavi Reference Type
ABST	Abstract	Journal Article

RIS Reference Type Code	RIS Reference Type Name	Citavi Reference Type
ADVS	Audiovisual material	Audio or Video Document
ART	Art Work	Unknown
BILL	Bill/Resolution	Unknown
BOOK	Book, Whole	Book
CASE	Case	Unknown
CHAP	Book chapter	Contribution in an Edited Book
COMP	Computer program	Software
CONF	Conference proceeding	Conference Proceedings
CTLG	Catalog	Unknown
DATA	Data file	Unknown
ELEC	Electronic Citation	Internet Document
GEN	Generic	Unknown
HEAR	Hearing	Unknown
ICOMM	Internet Communication	Internet Document
INPR	In Press	Unknown
JFULL	Journal (full)	Unknown
JOUR	Journal	Journal Article
MAP	Map	Map
MGZN	Magazine article	Journal Article
MPCT	Motion picture	Movie
MUSIC	Music score	Musical Work / Music Album
NEWS	Newspaper	Newspaper Article
PAMP	Pamphlet	Unknown
PAT	Patent	Patent
PCOMM	Personal communication	Personal Communication
RPRT	Report	Unpublished Work
SER	Serial (Book, Monograph)	Book
SLIDE	Slide	Unknown
SOUND	Sound recording	Audio or Video Document
STAT	Statute	Statute or Regulation
THES	Thesis/Dissertation	Thesis
UNBILl	Unenacted bill/resolution	Unknown
UNPB	Unpublished work	Unpublished Work
VIDEO	Video recording	Audio or Video Document

Field Mapping

When you import a RIS file, Citavi uses the following field mapping:

RIS	Citavi Generic
TY	ReferenceType
A1; AU	Authors
Y1; PY	Year
T1, TI, CT, BT	Title1
A2; ED	Editors
T2; BT	Title2; ParentReference
CP; CY	PlacePublished
PB	Publishers
VL	Volume
IS	Number
SP	PageRange
JO; JF	Journal
A3	Collaborators
T3	SeriesTitle
ET	Edition
Y2	Date
JA	Journal
SN	Isbn/Issn
U1	SpecialText1
U2	SpecialText2
U3	SpecialText3
U4	SpecialText4
U5	SpecialText5
KW	Keywords
N2	Abstract
N1	Notes
UR	OnlineAddress1
L1-L4	InternetLink
DO	DOI
SP + EP	PageRange
H1	LocationLibrary

H2	LocationCallNumber

6.2.3 Importing an EndNote Tagged File

In addition to RIS and BibTeX formats, many Web-based resources offer bibliographic information export in EndNote Tagged (ENW) format.

Citavi can import and export bibliographic information in EndNote Tagged format. A typical EndNote Tagged entry looks like this:

```
%0 Edited Book
%@ 978-3-8309-1689-5
%E Handke, Jürgen
%E Franke, Peter
%T The virtual linguistics campus
%D 2006
%C Münster
%I Waxmann
%J Strategies and concepts for successful e-learning
%P 324 S.
%K E-Learning
```

The field content follows a tag consisting of a percent sign and a field code.

Importing an EndNote Tagged File

- Many web-based databases support direct export to Citavi. See Searching Web-Based Databases and Importing Search Results for more information.
- If you have an EndNote tagged file (with the .enw file extension) on your computer already, double-click it to start the import or drag it into the navigation pane in the **Reference Editor**.

Reference Type Mapping

The reference types supported in EndNote Tagged format cover only a subset of the ones available in Citavi. This overview shows the mapping of reference types when importing from EndNote Tagged files:

EndNote Tagged reference type	Citavi reference type
%0 Ancient Text	Archive Material
%0 Artwork	Unknown
%0 Audiovisual Material	Audio or Video Document
%0 Bill	Unknown
%0 Book	Book
%0 Book Section	Contribution in an Edited Book
%0 Case	Unknown
%0 Chart or Table	Unknown
%0 Classical Work	Collected Work
%0 Computer Program	Software
%0 Conference Paper	Contribution in Conference Proceedings

%0 Conference Proceedings	Conference Proceedings
%0 Dictionary	Edited Book
%0 Edited Book	Edited Book
%0 Electronic Article	Journal Article
%0 Electronic Book	Book
%0 Electronic Source	Internet Document
%0 Encyclopedia	Edited Book
%0 Equation	Unknown
%0 Figure	Unknown
%0 Film or Broadcast	Movie
%0 Generic	Unknown
%0 Government Document	Unpublished Work
%0 Grant	Unknown
%0 Hearing	Unknown
%0 Journal Article	Journal Article
%0 Legal Rule or Regulation	Statute or Regulation
%0 Magazine Article	Journal Article
%0 Manuscript	Manuscript
%0 Map	Map
%0 Newspaper Article	Newspaper Article
%0 Online Database	Unknown
%0 Online Multimedia	Unknown
%0 Patent	Patent
%0 Personal Communication	Personal Communication
%0 Report	Unpublished Work
%0 Statute	Statute or Regulation
%0 Thesis	Thesis
%0 Unpublished Work	Unpublished Work
%0 Web Page	Internet Document
%0 Unused 1	Unknown
%0 Unused 2	Unknown
%0 Unused 3	Unknown

Field Mapping

When you import an EndNote Tagged file, Citavi uses various field mappings depending on the reference type. An EndNote Tagged file supports the following fields:

Field Code	EndNote Field Name
%A	Author
%B	Secondary Title (of a Book or Conference Name)
%C	Place Published
%D	Year
%E	Editor /Secondary Author
%F	Label
%G	Language
%H	Translated Author
%I	Publisher
%J	Secondary Title (Journal Name)
%K	Keywords
%L	Call Number
%M	Accession Number
%N	Number (Issue)
%P	Pages
%Q	Translated Title
%R	Electronic Resource Number
%S	Tertiary Title
%T	Title
%U	URL
%V	Volume
%W	Database Provider
%X	Abstract
%Y	Tertiary Author
%Z	Notes
%0	Reference Type
%1	Custom 1
%2	Custom 2
%3	Custom 3
%4	Custom 4
%6	Number of Volumes
%7	Edition
%8	Date
%9	Type of Work

%?	Subsidiary Author
%@	ISBN/ISSN
%!	Short Title
%#	Custom 5
%$	Custom 6
%]	Custom 7
%&	Section
%(	Original Publication
%)	Reprint Edition
%*	Reviewed Item
%+	Author Address
%^	Caption
%>	Link to PDF
%<	Research Notes
%[	Access Date
%=	Last Modified Date
%~	Name of Database

6.2.4 Importing Other Formats

Some information providers allow you to export lists of results but do not use one of the standard bibliographic formats. You can still import the results into Citavi as long as a special filter is available.

Importing Bibliographic Information Using Filters

1. In the **Reference Editor**, on the **File** menu, click **Import**.
2. Select **Text file (RIS, BibTeX, etc.)** and click **Next**.
3. Click **Add import filter**.
4. Type the name of the database that you want to export data from (for example, Blackwell Synergy) and click **Add**.
5. Make sure the database name is selected, then click **Next**.
6. Click **Browse** and select the file you want to import, then click **Next**
7. In the Import window that appears, you can choose which references you want to import. To import all the references, click **Add to project**. To add specific references only, first select the corresponding checkboxes and then click **Add to project**.
8. Select any appropriate import options and click **OK** to complete the import.

6.2.5 Importing a Database, Spreadsheet, or CSV File

Databases (such as Microsoft Access) and spreadsheets (such as Microsoft Excel or OpenOffice.org Calc) store structured information, often displayed as a table.

	A	B	C	D
1	Author	Title	Publisher	Year
2	Andretta, Susie	Information literacy	Chandos	2005
3	Bawden, David	Information and digital literacies		2001
4	Brook, Jenny; Franklin, Ginny; Stubl	INFORMS: The Information Skills Project		2003
5	Bruce, Christine Susan	Workplace experiences of information literacy		1999
6	Burkhardt, Joanna M.; MacDonald, M	Teaching information literacy	American Library Association	2003

The first row of a table, the *header row*, normally contains descriptions of the information stored in each column. Even simple text files can contain information structured in this way. All these files are relatively easy to import into Citavi.

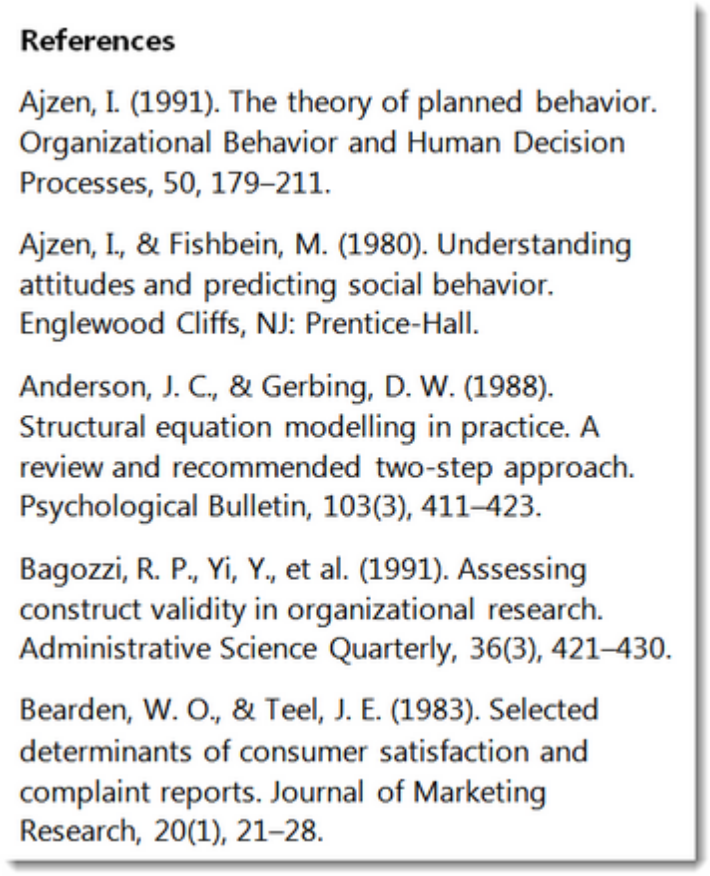
The first time you import a text file with tabular data, you configure how reference types in the file will be mapped to reference types in Citavi. For example, if in your table you have the description "Web page," you can tell Citavi to enter this data as an Internet Document.

1. In the **Reference Editor**, on the **File** menu, click **Import**.
2. Click **File containing tabular data** and click **Next**.
3. Select the format of the file you are importing and click **Next**.
4. Click **Browse** to select the file to import and then click **Next**.
5. If the spreadsheet or database file contains more than one worksheet or table, select the one that contains the references you want to import and click **Next**.
6. Select whether the first row contains column headers and click **Next**.
7. If the file contains a column with the reference type, select the column/field that contains it, then for each reference type in Citavi, type in the name of that reference type as it appears in the file. For example, if your file calls journal articles "article", then type `article` next to Journal article.
8. If your file doesn't contain a column with the reference type, select **Not available** on the column/field menu.
9. Select the reference type you want to define the field mappings for and click **Next**. In the next step, you will assign the fields in the source file to the corresponding Citavi fields for the selected reference type.
10. Choose **Do not import** if the selected column should not be imported to Citavi. Otherwise, choose the field in Citavi that you want to apply. Click **Next** to define the next field.
11. After you are done with one reference type, you will see the message **Do you want to define the field mappings for another reference type?** If there are more document types in the source file that you want to define, select **Yes**. Then click **Next**.
12. Repeat the process for each reference type. When are finished defining field mappings for all reference types, click No. Then click **Next**.
13. To save the custom filter you have created for future imports using the same field structure, select **Save as** and type a name.
14. Click **Next** to begin the import.
15. To add all displayed references to your project, click **Add to project**. To add specific references only, first select the corresponding checkboxes and then click **Add to project**.

Note: In order for the import to work, at least one column must be mapped to the Citavi **Title1** field.

6.2.6 Importing a Formatted Bibliography

At some point you may come across a list of references that is not formatted in a standard bibliographic format, for example a formatted bibliography in Word or PDF format.



References

Ajzen, I. (1991). The theory of planned behavior. Organizational Behavior and Human Decision Processes, 50, 179–211.

Ajzen, I., & Fishbein, M. (1980). Understanding attitudes and predicting social behavior. Englewood Cliffs, NJ: Prentice-Hall.

Anderson, J. C., & Gerbing, D. W. (1988). Structural equation modelling in practice. A review and recommended two-step approach. Psychological Bulletin, 103(3), 411–423.

Bagozzi, R. P., Yi, Y., et al. (1991). Assessing construct validity in organizational research. Administrative Science Quarterly, 36(3), 421–430.

Bearden, W. O., & Teel, J. E. (1983). Selected determinants of consumer satisfaction and complaint reports. Journal of Marketing Research, 20(1), 21–28.

Citavi helps you add these references to your project by searching for the references in research databases and library catalogs. The results will not be perfect, and typically only 50% to 60% of the references can be found. To increase your chance of success, use catalogs and research databases that are closest to your topic but still contain a large number of references.

When you do find a match, you will likely be able to add more information than you had initially, including abstracts and keywords.

If a reference is not found, Citavi will create a new reference in your project and copy the original data from the bibliography into the Notes field. You then can copy and paste this information into the correct fields.

Importing a Fornatted Bibliography

1. In the Reference Editor, on the **File** menu, click **Import.** Then select **Formatted bibliography**.
2. Click **Next**.
3. Click **Browse**, choose the file that contains the bibliography, and then click **Next**.
4. Citavi shows you the text in the file. Each paragraph represents a reference that Citavi will search for in the next step.
5. Choose the online resource that best fits the subject area of the references. Please note that library catalogs will only allow you to search for books and other self-contained works. To search for articles you should use a database. Click **Next**.
6. If you're satisfied with a result, select the checkbox next to it.
7. Click **Add to project**.

Importing a Formatted Bibliography from the Preview

Often you may have a reference in your project that contains full text (for example, an article from a peer-reviewed journal) and that includes a bibliography. You can use Citavi to search the bibliography and add the references to your project.

1. Click **Preview** and then click the name of the file to show it in the preview pane.
2. Highlight the bibliography.
3. Click **Tools** ( ), then click **Search Bibliography**.
4. Citavi shows the highlighted text. Each paragraph represents a reference that Citavi will search for in the next step.
5. Choose the online resource that best fits the subject area of the references. Please note that library catalogs will only allow you to search for books and other self-contained works. To search for articles you should use a database. Click **Next**.
6. Citavi searches for the references. After Citavi has finished searching, compare the entries in the bibliography with the search results.
7. If you're satisfied with a result, select the checkbox next to it.
8. Click **Add to project**.

6.3 Exporting from Citavi

Citavi provides several ways of exporting data from a Citavi project. You can either export information from one Citavi project to another, or to another application. The source Citavi project you export from remains unchanged.

When exporting to another Citavi project, you can choose to **move** files. The data is then copied into the target project and deleted from the source project.

You can export just one reference, a selection of references, or all the references in a project from the main window and table view. We recommend using table view if you want to export multiple references.

This chapter covers how to:

- Export to another Citavi project
- Copy data to the Clipboard
- Export to an RIS file
- Export to a BibTeX file
- Export to EndNote
- Export to a Microsoft Excel (or OpenOffice.org Calc) spreadsheet
- Save export presets

6.3.1 Exporting to Another Citavi Project

To quickly copy or move a single reference to another Citavi project, select the reference and then **Copy** (**Ctrl+C**) or **Cut** (**Ctrl+X**) it, then **Paste** (**Ctrl+V**) it into the other project. To copy or move more references, follow the instructions below.

Exporting to Another Citavi Project

1. If necessary, use labels or a search to create a selection of references to export.
2. In the **Reference Editor**, on the **References** menu, click **Copy or move to a Citavi project**.
3. Set the various options for the export, then click **Next**. You can choose:
   - Which references you want to move or copy.
   - Whether to copy the references (leave them in the source project) or move the references (delete them from the source project).
   - Which project you want to move or copy the references to (you can choose an existing project or create a new one).
   - Whether to ignore references with identical ISBN numbers.
   - Whether to switch to the destination project when done.
4. Select which additional information you want to include with the references, then click **Finish.**

6.3.2 Copying Data to the Clipboard

The easiest way to quickly share data is by copying it to the Clipboard.

Important: If you are working on a paper that later needs to be formatted with a bibliography, don't copy formatted references. Instead, insert placeholders, then format the publication when finished. See Creating a Publication with Word or Writer.

Copying Formatted References to the Clipboard

1. In the list of references, select one or more references. Right-click, then select **Copy formatted reference**.
2. Switch to another application, such as Word or an e-mail program. Click **Insert** or press **Ctrl+V** to insert the reference or references.

Hint: To copy a reference in BibTeX format, on the **Tools** menu, click **Options** and then select the **TeX support** checkbox.

6.3.3 Exporting to RIS

You can use RIS files to share your information with users of other reference management programs.

Exporting to RIS

1. In the **Reference Editor**, on the **File** menu, click **Export.**
2. Choose which references to export, then click **Next**.
3. Select **RIS**, then click **Next**.
4. Choose whether you want to copy the RIS data to the Clipboard or if you want to save it as a text file. If you choose **Save to text** file, click **Browse**, enter a name and location for the file, and click **Save**.
5. Click **Next**.
6. Choose whether you want to save the export preset for future exports, then click **Next**.

6.3.4 Exporting to BibTeX

BibTeX is an interchange format for bibliographic information that has been widely adopted. It is particularly important for inserting citations and bibliographies into LaTeX documents.

Exporting to BibTeX

1. In the **Reference Editor**, on the **File** menu, click **Export.**
2. Choose which references to export, then click **Next**.
3. Select **BibTeX,** then click **Next**.
4. Choose whether you want to copy the BibTex data to the Clipboard or if you want to save it as a text file. If you choose **Save to text file**, click **Browse**, enter a name and location for the file, and click **Save**.
5. Click **Next**.
6. Choose whether you want to save the export preset for future exports, then click **Next**.

Reference Type Mapping

The reference types supported in BibTeX are a subset of the types supported in Citavi. This overview shows the mapping of reference types when exporting to BibTeX.

Citavi	BibTeX Entry Types
News Agency Report	misc
File	misc
Archive Material	misc
Audio, Video, or Film Document	misc
Contribution in a Legal Commentary	incollection
Contribution in an Edited Book	incollection
Contribution in Conference Proceedings	inproceedings
Map	misc
Court Decision	misc
Statute or Regulation	misc
Legal Commentary	book
Unpublished Work	booklet
Thesis	phdthesis
Audio Book	misc
Radio Play	misc
Internet Document	misc
Interview Material	misc
Manuscript	unpublished
Book	book
Music Track	misc
Musical Work or Music Album	misc
Standard	misc
Patent	patent
Personal Communication	misc
Press Release	misc
Radio or TV Broadcast	misc
Edited Book	book
Software	misc
Special Issue	misc
Movie	misc
Conference Proceedings	proceedings

Unknown	misc
Lecture	misc
Collected Work	book
Journal Article	article
Newspaper Article	article

Note: By default, Citavi exports the contents of any field that is defined as required or optional for the reference type in BibTeX. You can customize BibTeX export as needed. To customize BibTeX export, on the **Tools** menu, click **Options**. Select the **TeX support** checkbox, then click **Customize**.

6.3.5 Exporting to EndNote

Citavi can export to two EndNote file types:

- **EndNote Tagged Import Format** is an interchange format that can be read by many reference management programs. Choose this file type to move references to another reference program.
- **EndNote** is EndNote's native file format. Choose this file type if you want to work in EndNote.

Exporting to EndNote

1. In the **Reference Editor**, on the **File** menu, click **Export.**
2. Choose which references to export, then click **Next**.
3. Select either **EndNote** or **EndNote Tagged Import Format**.
4. Choose whether you want to copy the data to the Clipboard or if you want to save it as a text file. If you choose **Save to text** file, click **Browse**, enter a name and location for the file, and click **Save**.
5. Click **Next**.
6. Choose whether you want to save the export preset for future exports, then click **Next** to finish.

6.3.6 Exporting to Excel or Calc

If you want to export data to a program that does not use a standard bibliographic format, you can export to Microsoft Excel or OpenOffice.org. We recommend using the table view to do this.

Exporting to Microsoft Excel, OpenOffice.org Calc, or LibreOffice Calc

1. In the **Reference Editor**, click **Table** or press **Ctrl+Alt+T**.
2. Click **Columns** to include additional fields in the export.
3. On the **References** menu, click **Export to Microsoft Excel** (or **Export to OpenOffice.org Calc**).
4. Choose where you want to save the spreadsheet, enter a name, and click **Save**. Citavi opens the spreadsheet automatically.

6.3.7 Saving Export Presets

If you export files often, you can save an export preset to save steps. The preset allows you to export files with a single click or automatically.

Saving an Export Preset

1. In the **Reference Editor**, on the **File** menu, click **Export**.
2. Choose which references to export, then click **Next**.
3. Select the desired format, then click **Next**.

4. Choose whether you want to copy the data to the Clipboard or if you want to save it as a text file. If you choose **Save to text file**, click **Browse**, enter a name and location for the file, and click **Save**.
5. Click **Next**.
6. Select the Save as, then enter a name in the text field. Select **Automatically export** when saving to automatically run this export in the background every time Citavi saves.
7. Click **Next**.

Using an Export Preset

In the **Reference Editor**, on the **File** menu, point to **Export** and click the export preset.

Deleting an Export Preset

1. In the **Reference Editor**, on the **File** menu, point to **Export** and click **Manage export presets**.
2. Select the export preset you want to delete and click **Delete**.
3. Click **Yes** to confirm.

7. Editing References

In this chapter, you will learn how to:

- Edit or delete references
- Link files to references
- Apply keywords
- Record locations

7.1 Editing or Deleting References

The Citavi **Reference Editor** provides two ways to work with your references: tab view and table view.

Working in Tab View

Tab view is where you can edit a reference.

1. Click one of the tabs, for example: **Reference**.
2. Place the insertion point in the text box where you want to make a change and enter the information accordingly.
   On some fields, you can also click the blue field labels or press **F9** to use an editor window. Some fields also offer a menu with existing entries. These fields are marked with an arrow symbol
3. To clear a field, select the text in the field and press **Backspace** or **Delete**.

Deleting a Reference

To delete a reference, select the reference and click **Delete** ( ).

You can only delete the current reference in tab view. Table view allows you to select multiple references and delete them all at once.

Warning: Deleting a reference cannot be undone!

Working in Table View

In the **Reference Editor**, click **Table** in the toolbar. A window opens showing the references as a table where you can:

- See a short summary of the references you have recorded including the reference type. You can choose which information is viewable by clicking the **Columns** button.
- Flag the references by clicking the blue label or red label to the left of each row.
- Change the order of a column by clicking its heading.
- Export your references to a spreadsheet by choosing **Export to Microsoft Excel** or **Export to OpenOffice.org Calc** from the **References** menu.

To edit references directly in the table, on the **Edit** menu, click **Turn on editing in place**. Please note that not all fields can be edited in place.

Selecting Multiple References in Table View

To select a contiguous series of references:

1. Click and hold on the first reference of the series.

2. Scroll down to the last reference of the series, if necessary, being sure to keep the mouse button depressed.
3. Hold the **Shift** key and click the last reference, releasing the mouse key.

To select multiple non-contiguous references:

1. Click the first reference you want to select.
2. Hold the **Ctrl** key and click each remaining reference.

7.2 Adding Cover Art

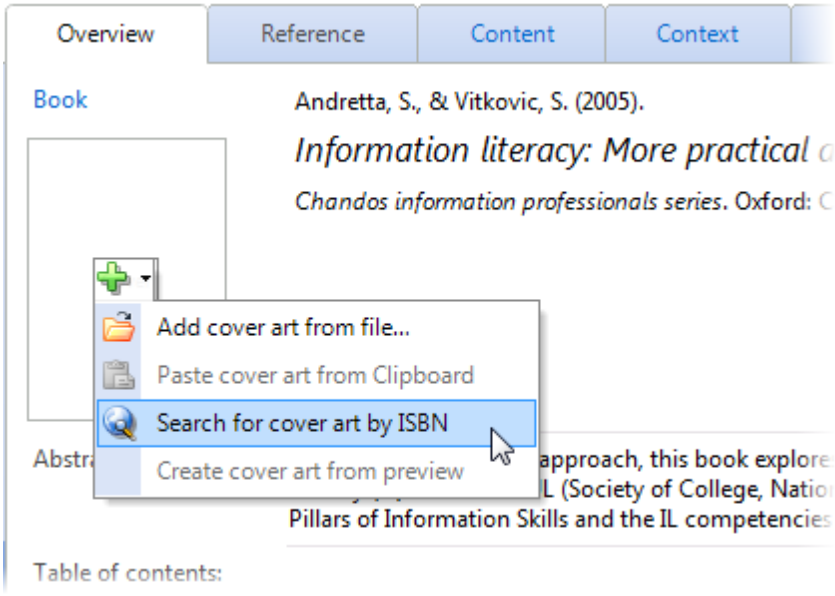
You can add cover art to every reference. Especially in large projects the cover art can make it easier to navigate your project. When you search for books from within Citavi, Citavi can save the cover art automatically. If you have linked a PDF or Web page to a reference, you can create cover art from the current preview.

Downloading Cover Art Automatically

1. On the **Tools** menu, click **Options**.
2. Click **Search**.
3. Under **ISBN download**, select the **Include cover art** checkbox and click **OK**.

Downloading Cover Art for an Existing Book

1. Open the **Overview** tab.
2. In the cover field, click **Add cover art** ( ), then:
   a) For books with ISBN numbers, click **Search for cover art by ISBN**.
   b) For books without ISBN numbers, or for those Citavi could not find cover art for, you can either try to locate the cover art online or you can scan it yourself. Then click **Add cover art from file** or **Paste cover art from Clipboard** to add it to the reference.



Creating Cover Art from the Preview

1. Open the **Overview** tab.
2. Make sure that the desired image appears in the Preview pane.
3. Click **Add cover art** ( ) and click **Create cover art from preview**.

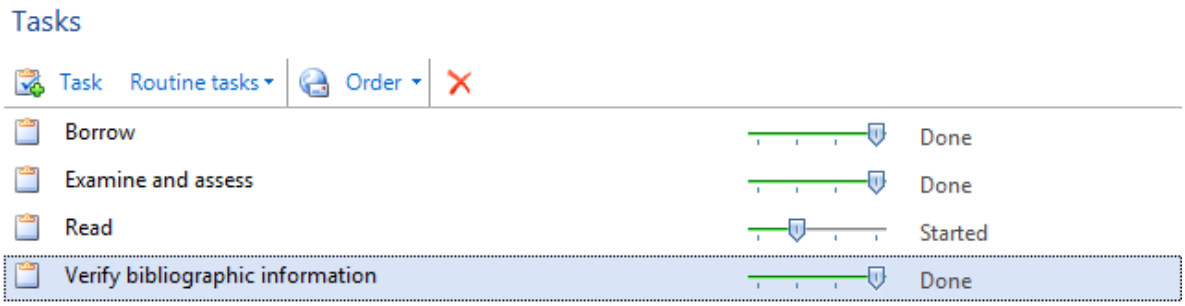
7.3 Verifying the Accuracy of References

For all of your references, you should always take the time to double check the bibliographic information, unless you have access to the original. If you want to do this later, you can create a task to remind you.

Creating a Task to Verify Bibliographic Information

1. In the Reference Editor, switch to the **Tasks & locations** tab.
2. Click **Routine tasks**.
3. Click **Verify bibliographic information**.

If you have access to the original work, you can compare it with the information in Citavi and correct it if necessary. When you have completed this task you can mark the task as done by dragging the slider to the right.



7.4 Linking Files to References

Citavi lets you link as many files as you want to a reference. The files can be saved locally on your computer, on a network share or server, or online.

Linking a File to a Reference

1. In the **Reference Editor**, find the reference you want to link a file to and switch to the **Reference** tab.
2. If you have a copy of the file on your own computer or local network, click **Local file** field. In the **Open** dialog, choose the file you want to link. You now have three options:
   a) If you want to leave the file in its original location, but want a copy in your Citavi project folder, select **Copy into the Citavi project**.
   b) If you want to move the file from its original location to your Citavi project folder, select **Move into the Citavi project**.
   c) If you want to leave the file in its original location and do not want a copy in your Citavi project folder, select **Link the file, but don't move it**. (If the file is on the same drive as your Citavi project, we recommend using relative paths.)
3. If you choose to copy or move the file, Citavi may ask you to give the file a new name. Citavi uses the short title of the reference. For example, if your file is named `chapter1.pdf`, the copy might be saved as `Miller 2010 - Evidence-based guidelines.pdf`. This is a simple way to apply meaningful file names.

Adding a Folder to a Reference

If you want to add multiple files from one folder to a reference, you can link the entire folder to the reference.

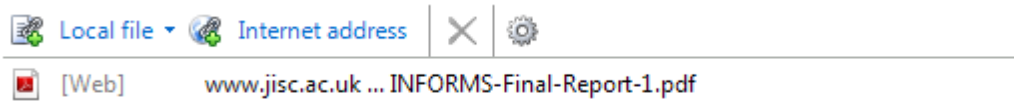
1. In the **Reference Editor**, switch to the **Reference** tab.
2. Click **Local file**.
3. Select the folder.

Adding an Internet Address to a Reference

1. In the **Reference Editor**, switch to the **Reference** tab.
2. Click **Internet address**.
3. Type the address, for example: `http://www.citavi.com`.

Recognizing the Location of a Linked File

You can easily see where a linked file is saved. Citavi labels each linked file with the type location.



The types of locations are:

- [Citavi] = the linked file is in the **`CitaviFiles`** folder
- [Local] = the linked file is on your computer, but not in the **`CitaviFiles`** folder
- [LAN] = the linked file is on a network share or server
- [Web] = the linked file is on the Web

Opening Linked Files

- To view a linked file, click the file name to highlight it. Then, in the Preview pane, click **Show in preview pane**.
- To edit a linked file, double-click the file name and then click **Open**.

Deleting a Link

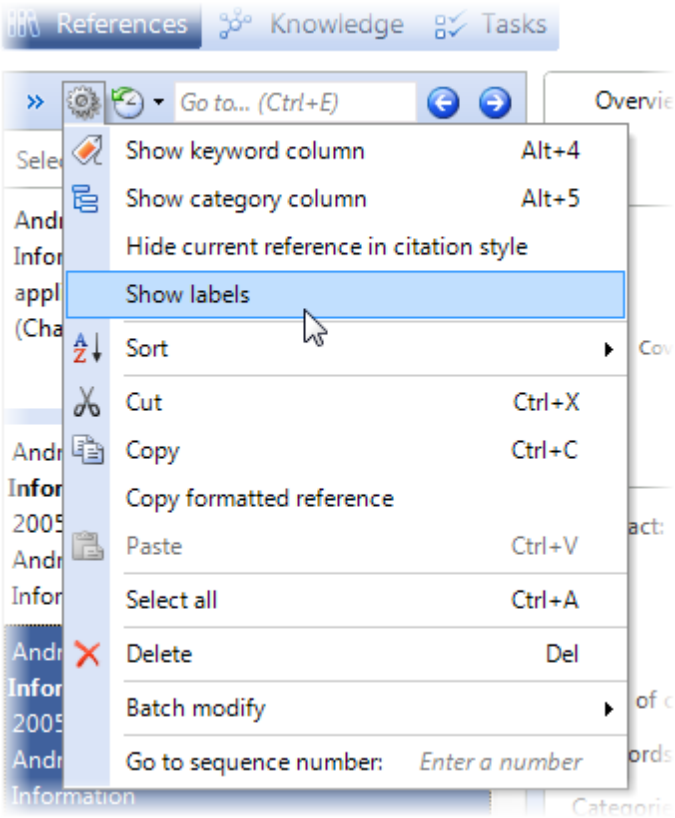
To delete a link, click it and then click Delete ( ).

If you delete a link to a local file or if you delete an entire reference, the linked file is moved to the **Recycle Bin** in the **`CitaviFiles`** folder. You can then retrieve files from this folder later on if you need them after all.

7.5 Labels

Labels are the quickest ways to mark a reference to indicate whatever you want. For example, you might use the red label to mean "important" and the blue label to mean "outstanding".

To use labels in Citavi, you need to make sure they are visible. If you do not see them to the left of each reference in the navigation pane on the left, click **Tools** ( ) and then click **Show labels**.



You can also use labels to facilitate the handling of multiple references. For example, you can mark all the references you want to export using the blue label. Or you can mark all the references you want to read in the coming week with a red label.

Table view is the fastest way to set labels to multiple references. First, select the references you want to set labels for. Then, on the **Edit** menu, point to **Blue label,** and then click **Set blue label for selected references** (or **Set red label for selected references**, respectively). You will also see other options for clearing labels from the selected references, or clearing labels from all references.

7.6 Creating a Table of Contents

You can save a reference's table of contents on the **Content** tab. Having the table of contents handy helps you identify the subject matter, topics, and main points of an item. It can also help you to place the item's contents into a larger context later on (see Retaining and Organizing Knowledge).

Often, you will not need to enter the table of contents by hand. Instead, many publishers' and booksellers' websites, as well as an increasing number of online library catalogs, offer the table of contents on a Web page, where you can copy it to the Clipboard and then paste it into Citavi. An even faster way is to use the Pickers.

7.7 Applying Keywords

Apply keywords to your sources so that you can find specific references in a project quickly or recall their contents more easily. Keywords should describe the *content* of the reference, not other characteristics.

To see and edit all the keywords in the project, on the **Lists** menu, click **Keywords**.

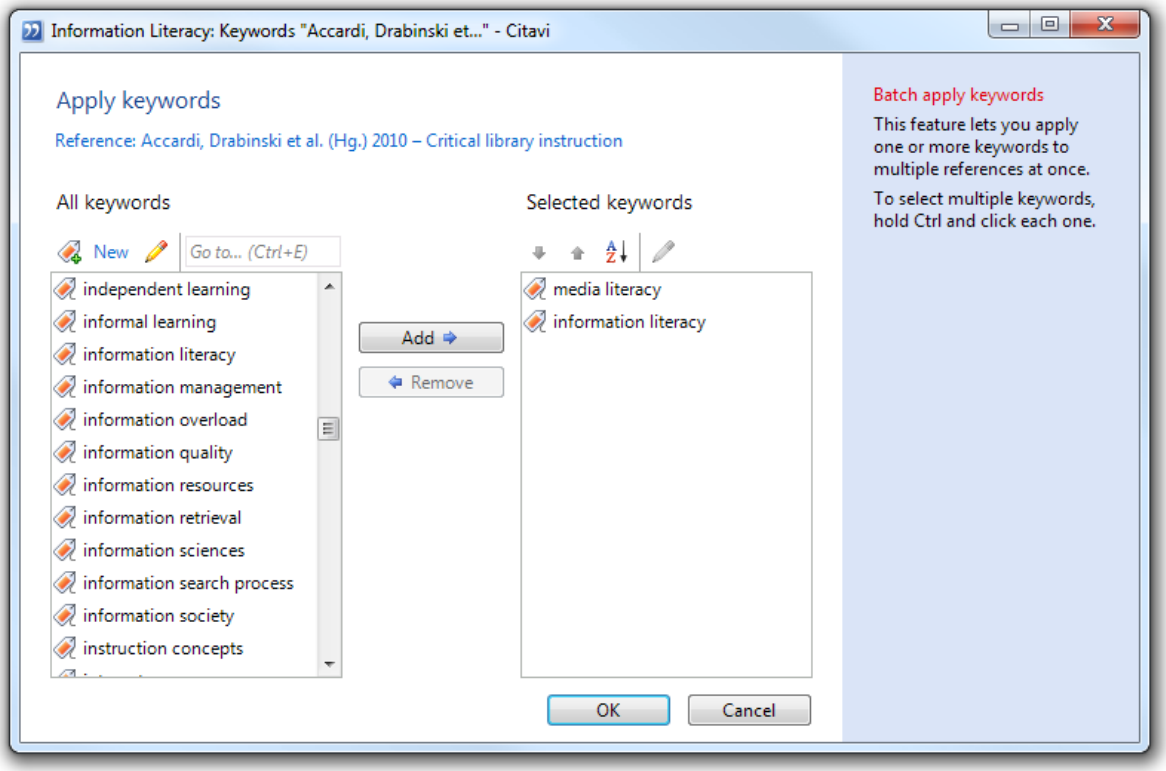
Applying Keywords to a Reference

1. In the **Reference Editor**, open the reference you want to apply keywords to.

2. Switch to the **Context** tab.
3. Type keywords into the **Keywords** box. Separate multiple keywords with semicolons.

Citavi will automatically complete the keyword you are typing using existing keywords in the project. To accept a suggestion, press **Tab** or **Enter**. To reject the suggestion, continue typing the new keyword. End the new keyword with a semicolon, or press **Esc**.

The keywords dialog allows you to apply multiple existing keywords to a reference simultaneously. Click the blue **Keywords** link or place the insertion point in the keywords field and press **F9** to open the dialog box. You can move existing keywords between the **All keywords** column and **Selected keywords** column by clicking **Add** or **Remove** or by double-clicking a keyword. To create a new keyword, click **New** in the toolbar, enter the new keyword, and click **OK**. Once the **Selected keywords** column contains all the keywords you want, click **OK** to finish.



Applying Keywords to Multiple References

1. Switch to the **Reference Editor**.
2. Click **Table** in the toolbar.
3. Select the references you want to assign a new keyword to by holding down **Ctrl** and clicking each reference.
4. Right-click any of the selected references, point to **Batch modify**, and then click **Apply keywords**.
5. Choose the keywords from the selection of existing keywords or add a new keyword and click **OK**.

Removing Keywords

To remove a keyword from a reference, either delete the the keyword in the keywords box by highlighting it and pressing **Delete** or use the Keywords dialog as described above.

Managing Your Keyword List

You can delete unused keywords, merge similar keywords, or add notes to keywords in a special list view. To view a list of all of your keywords, go to the **Reference Editor** and click **Lists** in the Navigation Bar.

7.8 Evaluating a Bibliography

Often when you are going through a scholarly journal article or a book, you can take a look in the bibliography to find other relevant sources on the same topic.

It's easy to add these references to Citavi. The quickest way to add references is via the DOI name or the PubMed ID, if they are listed. If that's the case, see Adding articles by DOI or PubMed ID.

If the bibliography is available in digital form (PDF, etc.) Citavi can search for the listed titles. To do this, see Importing from an unformatted bibliography.

7.9 Recording Locations

The **Tasks & locations** tab allows you to record:

- The call number of an item in a library
- The location of an item in your own personal collection (a room, bookshelf or file folder)
- The name and location of files on your computer

Recording the Location of a Work in a Library

1. In the **Reference Editor**, switch to the **Tasks & locations** tab.
2. On the **Location** menu, click **Library location**.
3. Enter the name of the library.
4. Enter the call number, for example `GT2919 N33 H37 1985`.
5. Click **OK**.

Hint: To see a list of all the libraries you have saved, on the **Lists** menu, click **Libraries**. You can rearrange the order of the libraries by clicking the library you want to move, then clicking the arrows in the toolbar to move it up or down. This way, the libraries you use most often can be placed at the top of the list. This is also useful if you want to sort tasks by location in the Task Planner.

Recording the Location of a Work in a Private Collection

1. In the **Reference Editor**, switch to the **Tasks & locations** tab.
2. On the **Location** menu, click **Private Collection**.
3. Enter the name of the location, e.g. "`Living room`".
4. Enter any call numbers or notes you want to add.
5. Click **OK**.

7.10 Adding Notes

Use the Notes field to enter additional information about a reference. When importing, Citavi saves data in the Notes field when it cannot be meaningfully mapped to another field. The Notes field is hidden by default.

Showing the Notes Field

1. In the **Reference Editor**, click the **Reference** tab.
2. Click **More fields**.
3. Select the **Notes** checkbox.

Viewing Notes

There are two additional ways to view and work with notes:

- In the **Reference Editor**, click **Overview**. Then click **Customize Overview** and select the **Notes** checkbox.
- You can also create an annotated project bibliography containing your notes. Switch to the **Reference Editor**, click the **Save project bibliography** arrow, and then click **Annotated project bibliography**. Then select the **Notes** checkbox.

8. Searching, Selecting, and Sorting in a Project

Citavi lets you collect and structure a great deal of information in a short time. Of course, you also need to be able to find this information again. Citavi offers a variety of robust search options to help you do this.

In this chapter you will learn how to:

- Search your project for references, quotations and thoughts
- Sort references in the list or table view

8.1 Searching and Selecting

Citavi offers you four different search options to help you quickly find an individual reference, a quotation, or a thought: **Go to**, **Quick search**, **Advanced search**, and **Quick select**.

Go to lets you quickly switch to a particular reference. **Quick search** and **Advanced search** can be used to find information in your project and also to save the search results as a selection. You can then use this selection for other applications, such as creating a project bibliography.

Quick select is usually the fastest way to see a selection of your references organized according to specific criteria.

In this chapter you will learn how to:

- Switch to a known reference
- Use the Quick search
- Use the Advanced search
- Obtain additional or fewer search results
- Search for alternative spellings
- Search using field codes
- Search with AND, OR, and NOT
- Use the comparison operators
- Search with truncation and wildcards
- Search with regular expressions

8.1.1 Switching to a Known Reference

Use the **Go To** feature to quickly switch to a reference in your project.

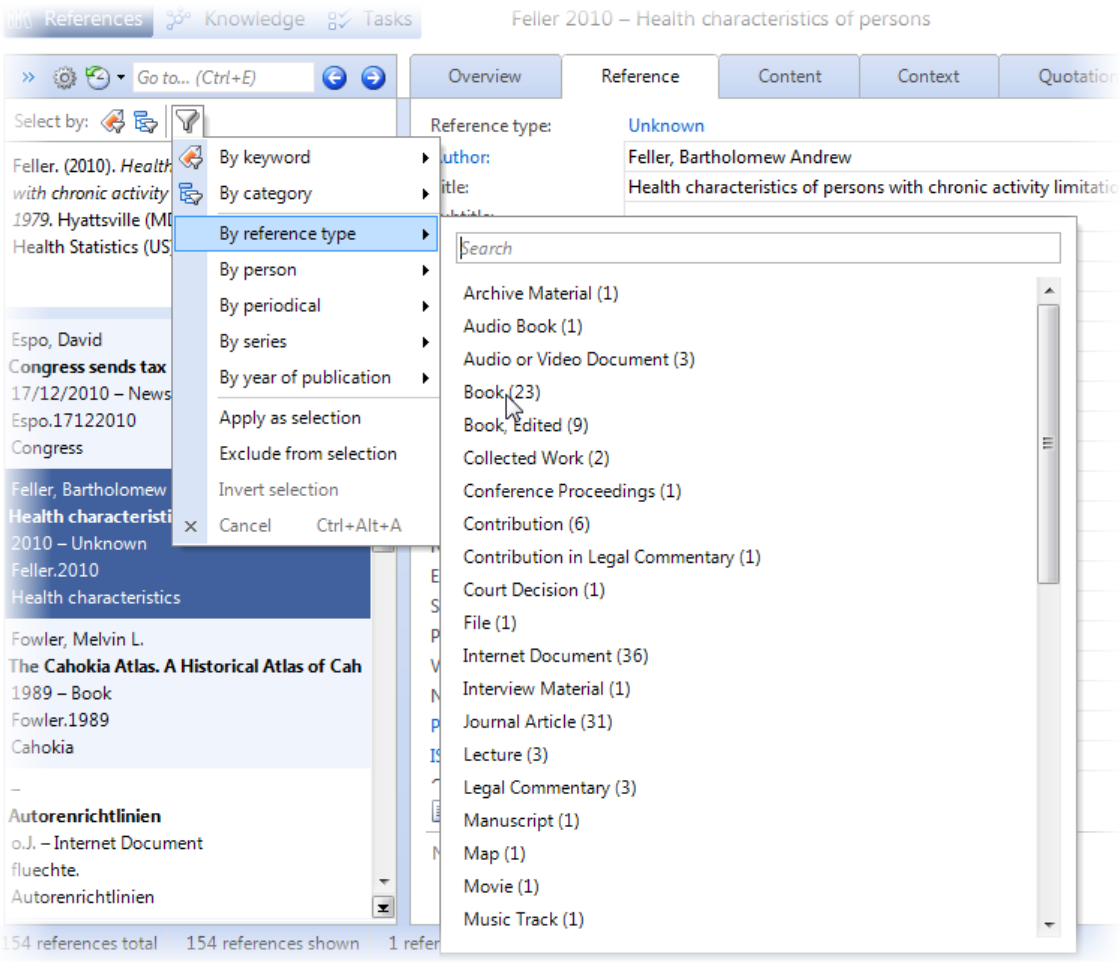
Quickly Switching to a Known Reference

1. In the **Reference Editor**, click **Go to** on the toolbar or press **Ctrl+Space**.
2. Begin to type words from the **Short title**. As you type, the list of references is narrowed down.
3. Select the desired reference and click **OK** to switch to it.

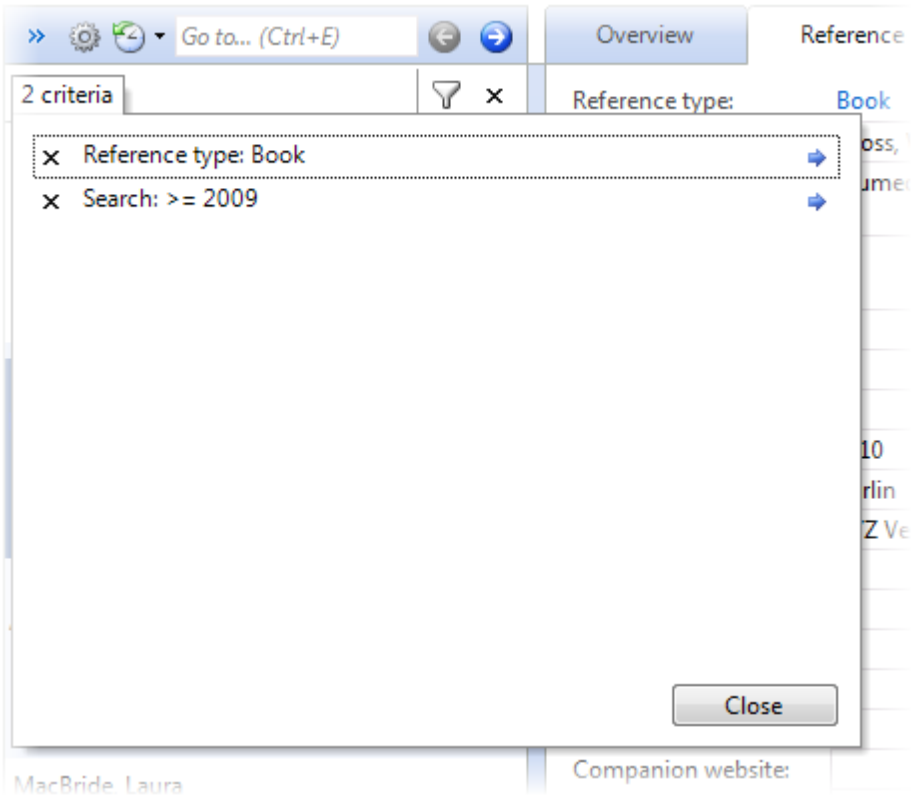
Please note that **Go to** only searches the short title (author last name, year, first word of the title). If you need to search by any other search criteria use the Quick Search feature.

8.1.2 Quick Select

Quick select lets you filter references according to frequently used criteria. You can filter by category, keyword, reference types, person, periodical, series, and year of publication. In the navigation pane, click **More selection options** ( ) and choose the criterion you want to apply.



You can also apply multiple criteria in a set order. The criteria are automatically joined. To delete one of the Quick select criteria, click the **Remove criterion** button for the criterion. To reverse the effect of a criterion (i.e. "All references except..."), click its arrow. To cancel all Quick Select options, click the **Cancel** button.



8.1.3 Quick Search

Use **Quick search** to find any item in your project. We recommend using Quick search for smaller projects with up to 300 references to ensure that the result list is not too long that it's difficult to use. For larger projects, you may obtain better results using the Advanced search.

Using Quick Search

1. In the Reference Editor, in the toolbar, click **Search**.
2. Type in the search term. You can use field abbreviations to restrict the search to specific fields.
3. Click **Search** or press **Enter** to perform the search.

Click **Apply search results as selection** to hide the other references in the project.

Applying and Canceling Selections

The function **Apply search results as selection** allows you to easily perform other actions with a subset of your references.

1. Perform a search.
2. Click **Apply search results as selection**.
3. Work on the selected references as needed.
4. Click **Cancel selection** to show all references.

8.1.4 Advanced Search

In large projects, **Advanced search** helps you find information quickly by creating specific, targeted searches.

Using Advanced Search

1. In the Reference Editor, in the toolbar, click **Search**. Then click **Advanced search**.
2. Select the field you want to search in.
3. Type the search text for that field. Some fields, such as keywords, offer a menu of existing terms. You can also use wildcards.
4. Repeat steps 2 and 3 for any additional conditions. Click **Add condition** if you need more conditions.
5. If you are using multiple search conditions, select whether to combine them with AND, OR or NOT operators and parentheses.
6. Click **Search** or press **Enter** to perform the search.

8.1.5 Managing the Number of Search Results

To obtain more search results:

- Select the **Ignore case** (A=a) checkbox. This allows Citavi to find both `UNICEF` and `Unicef`.
- Select the **Equivalent characters** (e.g. ä=ae) checkbox. This allows Citavi to find words with spelling variations, for example `Zürich` and `Zuerich`.

To get fewer but more precise search results:

- Select the **Whole words only** checkbox. If you select this option and search for `Info`, Citavi will not find `Information`.
- Use field abbreviations to restrict the search to certain fields.

8.1.6 Defining Equivalent Characters

By defining equivalent characters, Citavi will search for spelling variations of search terms. For example, if you search for the word facade, Citavi will also find the spelling façade.

1. In the Reference Editor, in the toolbar, click **Search**.
2. Make sure the **Equivalent characters** option is selected, then click **Customize**.
3. Click **Add** to add a new equivalent character pair.
4. In the **Searching for** box, type the characters that you want to use during a search.
5. In the **Also finds** box, type the equivalent characters that Citavi should also find.
6. Click **OK** and then click **Close.**

Note: To define equivalent characters, your project must contain at least one reference.

8.1.7 Using Field Codes

You can search specific fields in a quick search by placing the field name before the search terms.

For example, to search for references with the author "Smith", you enter:

```
Author: Smith
```

A field code is even quicker to use:

```
a: Smith
```

The most frequently used fields have field codes, which are shown in the table below:

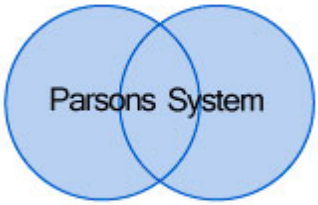
a	**Person fields (author, editor, etc.)**
c	Categories
d	Date of publication
full	Full text
i	Thoughts
iq	**Quotations and Thoughts**
j	Periodical
k	**Keywords**
kn	Knowledge fields (thoughts, quotations, categories, core statements, abstracts, tables of contents, comments)
l	Red label
loc	Location fields
n	Notes
o	Blue label
pl	Place of publication
pub	Publisher
q	Quotations
r	Reference type
t	**Title, subtitle, title supplements, other title variations**
t1	Title
t2	Subtitle
task	Task fields

To see which fields are searched by a particular field abbreviation, in the **Advanced search**, select a **search field**, then click a field, and then click **Details**.

Hint: If you want to search by date of publication, be sure to use the d: field code because otherwise the search will look in every field. For example, searching for "2009" alone would also find last modified dates or ISBN numbers containing "2009".

8.1.8 Searching with Boolean Operators: AND, OR, NOT

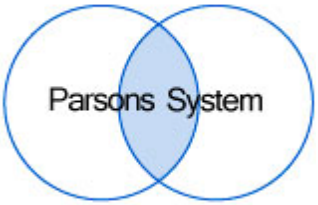
You can use Boolean operators to join search terms to improve the number and quality of search results. Three Boolean operators are available: **AND**, **OR** and **NOT**. Note that the operators must be entered in uppercase letters in order to be recognized as operators.



The **OR** operator increases the number of search results

`Parsons OR System`

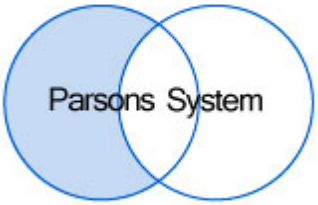
finds any references that contain the search term Parsons, any references that contain the search term System, as well as any references that contain both search terms Parsons and System.



The **AND** operator reduces the number of search results

`Parsons AND System`

finds only references that contain both of the search terms Parsons and System.



The **NOT** operator reduces the number of search results

`Parsons NOT System`

finds references that contain the search term Parsons but do not contain the search term System.

When using multiple search terms with multiple operators, use **parentheses** to make sure your search intent is clear:

`Parsons OR Luhmann AND System`	finds references that contain the search term Parsons (but not necessarily the search term System) as well as references that contain both search terms Luhmann and System.
`(Parsons OR Luhmann) AND System`	finds references that contain the search term System combined with either the search terms Parsons, Luhmann, or both.

To search for a specific phrase, place it in quotation marks: `"social system"`

Hint: You can use field names, search terms, Boolean operators, and parentheses in a quick search, too.

8.1.9 Searching with Comparison Operators

Comparison operators let you refine your searches in both the Quick search and Advanced search. For example, you may want to find references published after 2004, or references that don't have a location.

Greater Than and Less Than

Use these operators to find references published within a particular time span:

> Greater than

< Less than

>= Greater than or equal

<= Less than or equal

Examples

What you want to find:	What to type in the Search criteria box:
References published before 2010	d: < 2010
References added to a Citavi project in 2010	"created on": = 2010
Thoughts and quotations that were added to a Citavi project between November 30, 2010 and March 4, 2011	"created on": >=30.11.2010 AND "created on" <=4.3.20011

Empty and Not Empty

To restrict a search to references with a field that is empty (or not empty, i.e. with any content in the field), use the exclamation point or asterisk:

! Is empty

* Is not empty

Example: Finding references whose bibliographic information has not yet been verified:

What you want to find:	What to type in the Search criteria box:
References without keywords	k: !
References that have not yet been checked against the original source	"original checked by/on": !
References with an original publication date	"original publication": *

8.1.10 Searching with Wildcards

When you search in a project, Citavi automatically looks for the search term inside words. For example, if you search for `glass`, Citavi will find **glass**, **glassworks**, and **fiberglass**. To search for the exact search term only, select the **Whole word only** option.

You can also use two wildcards:

- The asterisk (`*`) stands for any number of characters in the search term:
  `s*der` finds **spider**, **salamander**, **stockholder**, or **solder**
- The question mark stands for exactly one character (including spaces):
  `?iger` finds **Tiger**, **Eiger** and **Giger**
  `W??d` finds **Ward**, **Wood**, **Wyld**

On occasion you might want to search for a question mark or an asterisk. In order for Citavi to recognize that you want to search for the specific character and do not want to use truncation, you must use a regular expression:

- RX_\? finds works that have a question mark in the field you are searching
- RX_* finds works that have an asterisk in the field you are searching

8.1.11 Searching with Regular Expressions

For technically adept users, Citavi supports searching with regular expressions (regex). See www.citavi.com/softlink?linkid=regexintroduction for an introduction to regular expressions, and refer to www.citavi.com/softlink?linkid=regexinfo for more detailed information.

When performing regex searches, prefix the search terms with `RX_`. For example, to search for Meier, Maier, Meyer and Mayer, enter:

```
RX_M[ae][iy]er
```

Be sure to type `RX_` in capital letters so that Citavi can recognize it as a command. You can use regular expressions in both quick and advanced searches.

You can also combine standard Citavi search syntax with regular expressions. The following example shows an author search with a regular expression combined with a standard search for the collected works reference type.

If your regular expression contains parentheses or spaces, you must place the entire regular expression, including the `RX_` prefix, in quotation marks.

Search options: Regex searches respect the **A=a** (Ignore case) option. The **Whole word only** and **Allow spelling variations** (ä=ae) options are ignored in a regex search. If necessary, provide the necessary conditions or equivalencies in the regular expression itself:

`"RX_\binfo\b"` finds "info" as a word, but not "information"
`"RX_Z(u|ü)rich"` finds "Zurich" and "Zürich".

Wildcards: During a regex search, the ? and * wildcards have their normal regex meanings and are not interpreted as wildcards.

8.1.12 Actions After a Search

You can use **More actions** to apply search results to selections:

- **Apply to selection** applies the selected search results as the current selection.
- **Exclude from selection** removes the selected results from the current selection.
- **Add to selection** adds the selected search results to the current selection.

Actions After a Search

1. Run your search.
2. Click the reference you want to select. To select multiple references, hold the **Ctrl** key and click each additional reference. To select a contiguous series of references, click the first one in the series, then hold the **Shift** key and click the last one in the series.
3. Click **More actions** or **right-click** any of the selected references and select the desired action, for example setting labels or using **Batch modify** to assign categories, apply keywords, or add tasks.

8.2 Sorting and Grouping

By sorting according to various criteria, you can gain new insight into the interconnections between various references or make it easier to manage a large amount of information. In Citavi, Table view lets quickly sort items in your project. In the Table view you can also group various items.

In this chapter you will learn how to:

- Sort in Table view
- Add additional columns in Table view
- Group items in Table view

8.2.1 Sorting in Table View

Table view is useful for sorting the contents of your project numerically (for example, by year of publication) or alphabetically (for example, by author). Simply click a column header to sort by that column.

Opening Table View

To open the table view, in the **Reference Editor**, click **Table view** in the toolbar or press **Ctrl+Alt+T**.

Changing the Sort Order

- To sort alphabetically or numerically by a column, click the header of that column.
- Click the header again to reverse the sort order.
- To sort by an additional column, hold the **Shift** key and click another column header.

Hint: To quickly switch to a reference in the selected column, begin typing the word or name. For example, if the table is sorted by title, you could start to type "man" to jump to the reference "Managing Unstructured Information".

8.2.2 Adding Columns

Adding, Removing, and Changing the Order of Columns

1. To open the table view, in the **Reference Editor**, click **Table view** in the toolbar or press **Ctrl+Alt+T**.On the **View** menu, select **Choose columns**.
2. To add a column, select a column name from the list of **All columns** and click **Add**.
3. To change the order of the columns, select a column name from the list of **Selected columns** and click the **Move up** or **Move down** arrows**.** You can also change the order in the table itself by dragging the headers where you want them.
4. To remove a column, select a column name from **Selected columns** and click **Remove**.
5. Click **OK** to finish.

Note: The column headings do not vary according to reference type. For example, the name of an inventor (of a patent) or the name of a director (of a film) will appear in the **Author** column.

8.2.3 Grouping References

Grouping References

You can group references by various criteria, for example, by keywords or by categories. If you select multiple criteria, the references will be grouped by the first criterion first, and then within that group, by the next criterion, and so on.

1. To open the table view, in the **Reference Editor**, click **Table view** in the toolbar or press **Ctrl+Alt+T**.
2. On the toolbar, click **Group**.
3. To add a group criterion, select a field name from the list of all columns on the left and click **Add**.
4. To change the order of the criteria, select a field name from the **Group by** list and click the **Move up** or **Move down** arrows.
5. To remove a criterion, select a field from **Grouped columns** and click **Remove**.
6. Click **OK** to finish.

9. Task Planning

Research involves a number of tasks. In this chapter you will learn how to:

- Add tasks to a reference
- Create your own tasks
- Add project tasks
- Viewing Tasks
- Print handy Task Lists
- Track your progress

9.1 Adding Tasks

Research involves many tasks: making photocopies, verifying bibliographic information, and/or borrowing books. You can add as many tasks as you like to individual references and to your project as a whole.

Adding a Task to a Single Reference

1. In the **Reference Editor**, find the reference you want to add a task to.
2. Click the **Tasks & Locations** tab.
3. Click **Task**.
4. Click the **Task** drop-down list and choose the type of task to schedule. If the task you need is not in the list, choose **Other** and describe the task in the Notes box.
5. Complete the remaining fields and then click **OK**.

Hint: If you do not want to enter details about a task, use the **Routine tasks** menu on the **Tasks & Locations** tab. Click **Routine Tasks**, then click the task type to add it.

Adding a Task to Multiple References

1. In the **Reference Editor**, on the toolbar click **Table View**.
2. Hold the **Control** key and click the references to select them.
3. Right-click one of the selected references.
4. Point to **Batch Modify** and click **Add Task**.
5. In the options window that appears, click **The *n* selected references**.
6. Click the **Task** drop-down list and choose the kind of task you need to schedule. If the task you need is not in the list, choose **Other** and describe the task in the **Notes** box.
7. Complete the remaining fields and then click **OK**.

9.2 Creating Your Own Tasks

You can add your own tasks to Citavi's default list of tasks. Each task you create will only be available in the project it was created in. It will automatically disappear from the list of task types if it's no longer being used by any refererence.

Creating a Task

1. In the Reference Editor, find the reference you want to add a task to.
2. Click the **Tasks & Locations** tab.
3. Insert the placeholder in the **Task** field and type in the new task type. For example, `Return book to Dr. Smith`.
4. Complete the remaining fields and then click **OK**.

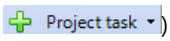
Deleting a Task

1. Go to the Task Planner.
2. Make sure the option **Hide completed tasks** is not selected.
3. Click the task you want to delete.
4. Right-click and then click **Delete**.

9.3 Adding a Project Task

A project task is a task that is not directly related to any one reference but that concerns your Citavi Project as a whole, for example, *present research at colloquium*.

Adding a Project Task to Your Project

1. Switch to the Task Planner.
2. In the toolbar, click **Project task** (

).
3. In the **Task** field, type the name of the project task and set the due date and importance.
4. Click **OK**.

9.4 Viewing Tasks

Use the Task Planner to get a better idea of important or pressing tasks. Click **Quick select** to see common task selections and to separate out the tasks that are most important or the most current. Additionally, you can set your own individual criteria to view only certain tasks in the list.

Creating Your Own Selection

1. In the **Task Planner**, click **Advanced selection**.
2. Select the options you want: for example, high-priority tasks, such as requesting interlibrary loan items

Hint: You can save your selection by clicking **Save selection**. Choose a name that reflects the selected tasks (e. g. "order books soon!"). The selection will now appear in the **Quick select** menu. To delete a saved selection that you have created, select the saved selection. Then on the **Edit** menu, click **Delete saved selection**.

Working with Columns

- Right-click a column header and then click **Choose columns** to select the columns to display. To add a column to the table, click the name under **All columns**, and then click **Add**. To remove a column, click the name in the list of **Selected columns** and then click **Remove**.
- Click a column header to sort by that column. An arrow next to the column name shows in which order the column is sorted.
- Drag column headers to change the order of columns.
- To change the width of a column, drag the dividing line between the column headers. To fit the width of a column to it contents, double-click the dividing line to the right of the column header.

9.5 Printing Task Lists

You can use Citavi to create a task list for an upcoming visit to a library or archive. You could also print a list of tasks for a group project.

Printing a Task List

1. Switch to the **Task Planner**.
2. Use **Quick Select** or **Advanced Selection** to choose the tasks you want to print as a list.
3. On the **File** menu, choose **Print task list**. Or, in the toolbar click **Task list**.

Hint: Sort by location first. This can save you time in the library when searching for books.

9.6 Tracking Your Progress

With Citavi you can easily keep track of whether a task has been started or not, partly completed, or completed.

Setting a Task Status

1. Switch to the **Task Planner**, or to the **Tasks** tab in the Reference Editor.
2. Right-click the task you want to edit.
3. Click **Status.**
4. Click the status you want to set: **Not started**, **Started**, **Advanced**, or **Completed**.

Hint: In the Task Planner, you can also view all your completed tasks. On the **View** menu, click **Show completed tasks**.

10. Obtaining Materials

Citavi helps you easily obtain books and journal articles.

In this chapter you will learn how to:

- Check whether a book is available in your preferred library
- See if a book has been checked out or if an article can be ordered through Interlibrary Loan
- Search for the full text of a journal or newspaper article
- Order books through an online store or a local retailer

10.1 Locating Books

During your research you may have found bibliographic information for relevant books and imported it into your Citavi project. To locate copies of these books, you can check if they are available through the library you use most often. The requirements are:

- The book must have an ISBN number
- The library catalog must support searching by ISBN number
- The library catalog must include location information in search results

Locating a Book

1. In the Reference Editor, switch to the reference that you want to locate.
2. On the **Tasks & Locations** tab, click **Find library locations**.
3. If you need to, add additional libraries to search under **Tools** > **Options**. On the **Search** tab, click **Add database or catalog**. Find the library and click **Add**. Click the up arrow to move your local library to the top of the list so that that it is searched first.
4. If you want, select **Make note of unsuccessful searches**. If no location information is available in any of the selected catalogs, Citavi will make a note of it.
5. Select whether you want to add only the first location found for each reference or if you want to add all locations found for each reference.
6. Click **Find locations**.
7. When the search is complete, click **Save locations**.

Locating Multiple Books

1. If you want, you can search for all books in your project that do not yet have location information. To do this, switch to the Quick Search by pressing **Ctrl+F** and enter **loc: !** in the search field. Click **Apply search results as selection**.
2. On the References menu, click Find library locations and then click **The *n* references with ISBN numbers in the current selection**.
3. In the Reference Editor, switch to the reference that you want to locate.
4. On the **Tasks & Locations** tab, click **Find library locations**.
5. If you need to, add additional libraries to search by going to **Tools** and clicking **Options**. On the **Search** tab, click **Add database or catalog**. Find the library and click **Add**. Use the upward-pointing arrow to place the library at the top of the list to ensure that it is searched first.
6. If you want, choose the option **Make note of unsuccessful searches**. If no location information is available, Citavi will make a note of it.
7. Select whether you want to add only the first location found for each reference or if you want to add all locations found for each reference.
8. Click **Find locations**.
9. When the search is complete, click **Save locations**. All references with ISBN numbers that were found in a catalog now have locations.

Analyzing ISBN Lists and Searching for Locations

Follow these steps if you have a list of ISBN numbers of books that you want to add.

1. Copy the list to the Clipboard.
2. In the Reference Editor, click **Retrieve by ISBN**.
3. Select **Text from Clipboard**.
4. Click **Paste from Clipboard**.
5. After the search is complete, click **Add to project**. All references that were found will be added as a selection to the open project.

You can also take this opportunity to find the references that are not available in your library. This is useful for adding **Buy or order** tasks to each of the references.

Finding Books that are Not Available at Your Library

1. Open **Quick Search** (click **Search** or press **Ctrl+F**).
2. First, find the references that are available at your library. Enter the name of your library in the search field. For example, if you visit the Library of Congress, enter `loc: Library of Congress` to find all references containing "Library of Congress" in their locations.
3. Press **Ctrl+A** to select all the results.
4. Click **More Actions** and then click **Exclude from selection**. All the references that are *not* available at your library are now selected.
5. You can now add a task to these references. Press **Ctrl+A** to select all the references in the selection. On the **References** menu, click **Batch modify** and then click **Add task**.
6. Choose a task type from the list, such as **Buy or order**. Click **OK** to add the **Buy or order** task to each reference.

10.2 Checking Availability Using OpenURL

During your research, you've amassed the bibliographic information of relevant literature in Citavi. Now you want to borrow the books or make copies of individual journal articles. Does my university library have a copy of the book? If so, can I borrow it? If not, is an interlibrary loan possible? Does my library subscribe to a printed or electronic version of the journal containing the article I am looking for? If not, can I obtain a copy from a document delivery service or interlibrary loan?

OpenURL can help answer these questions by linking to usable resources. Generally speaking, universities or employers subscribe to the necessary services. Whether you are entitled to access these resources is usually authenticated by IP address, although other methods are possible.

How Does OpenURL Work?

OpenURL is a method to generate a URL (Uniform Resource Locator) with the bibliographic information. Citavi relays your query to your library's OpenURL link resolver. The link resolver uses the bibliographic information contained in the URL to search the library catalog and other resources and services that are available to you.

For example, you might find the information for a journal article in a database. You can use OpenURL to see if you have access to a full text of an article.

To use OpenURL, you need to find out whether your library has an OpenURL resolver and what the "base URL" is. Citavi already contains the base URLs of many libraries. If your library is not included in the list, ask a librarian for the necessary information.

How to Enter a Base URL in Citavi

1. On the **Tools** menu, click **Options**.
2. Switch to the **OpenURL** tab.
3. If you know the base URL, enter it and then continue with step 5. If you want to use a predefined base URL, click **Base URL**.
4. From the list, choose the country and then the library running the OpenURL resolver. Click **OK**.
5. Click **OK** again.

How to Carry Out an Availability Search With OpenURL

1. Make sure that the base URL of your library's OpenURL resolver appears under **Options** (see above).
2. Make sure you have an active connection to the Internet.
3. In the Reference Editor, switch to the reference whose availability you want to check.
4. On the Reference menu point to **Check availability and find full text**, and click **Check availability with OpenURL** (or press **Ctrl+Shift+L**).
5. Citavi loads the results in your Web browser.

Rarely Needed: How to Define Which Parameters to Use to Generate an Open URL

1. On the **Tools** menu, click **Options**.
2. Switch to the **OpenURL** tab.
3. Select the checkboxes for the parameters you want to include in the OpenURL.

OpenURL und SFX

More often than not, you will see the term and logo SFX used instead of OpenURL. When you click the SFX icon that appears next to a database or catalog entry, you can view additional services. You will only see the services that are offered by your institution. These options could include the following:

- **Full Text available via**
  = the full-text article is available online through your library
- **Holdings in**
  = a list of libraries that own the book or journal
- **Order a copy of this article from**
  = this option allows you to purchase a copy of the article if the full-text article is not available for free online
- **Reviews**
  = this option allow you to search for book reviews in online booksellers and search engines such as Amazon, BookFinder, and addall
- **Author / Citation Analysis**
  = this option allows you to search for an article by a certain author in Web of Science, where you can see how often the article was cited and by whom
- **Search for related information in Google Scholar**
  = search by title or author in Google Scholar
- **Search for related information in a Web Search Engine**
  = search by title in various search engines
- **Journal Info**
  = view information about a journal, such as the publisher, frequency of publication, subscription prices, etc.
- **Reference**
  = export bibliographic information directly to Citavi or EndNote.

For "Techies": How an OpenURL is Generated

An OpenURL comprises the following components:

- The base URL, which identifies the link resolver (required)
- Information about the compiler of the OpenURL (optional)
- The query string containing the bibliographic information (required).

The following OpenURL is made up of the base URL of the Free University of Berlin link resolver (sfx.kobv.de/sfx_fub) and the author, year of publication, ISSN, etc.:

http://**sfx.kobv.de/sfx_fub**?sid=SwissAcademicSoftware:Citavi&**aufirst**=Gavin&aulast=Brown& **date**=2005&epage=1048&**issn**=0033-2941&issue=3&pages=1044-1048&spage=1044& title=Student%20information%20literacy:%20psychometric%20validation%20of%20a%20self-efficacy%20report&volume=96

10.3 Finding Full-Text Articles

Many information providers offer journal and newspaper articles for download in PDF format. However, full-text access generally requires payment. Universities and large companies often pay for access to databases so that you can search and view articles.

Citavi searches the following databases for full-text articles.

- BASE
- DOAJ
- Doi.org
- OCLC OAIster
- PubMed
- Scirus
- SSRN
- WorldCat

In addition, Citavi searches the Link resolver that you selected for checking availability and finding full text.

Finding Full-Text Articles Online

1. If you are working off-site, please ensure that your computer is connected to your university or company via VPN, since most full-text articles require a subscription to access. The VPN connection allows the provider to verify that you are authorized to use the database.
2. Switch to the Reference Editor. On the **References** menu, point to **Check availability and find full text**, and click **Check availability with OpenURL** if you have already added your university's link resolver in the **Options**. If not, click **Find full text**.
3. Choose which references you want to perform the full-text search for: the selected journal or newspaper article(s), or all of the journal or newspaper articles in the project.
4. Click **Find full text**.
5. Citavi searches for the full text.
   a) If in step 4 you select the **Download full text** checkbox, Citavi will save copies of the PDF files to your computer and add the link to the file to each reference.
   b) If in step 4 you do not select the **Download full text** checkbox, Citavi will save a link to the Web page where you can access the PDF file. In the Preview pane you can click the link to show the full text. Citavi will offer you an option in the Preview to save a copy of the PDF as a local file.
6. Click **Close**.

10.4 Ordering Books and Articles

Citavi helps you order books from a bookseller, be it an online bookseller or a neighborhood book shop.

If you have a service that helps you obtain articles, see **Ordering an Article** below.

Selecting Your Preferred Bookseller

1. On the **Tools** menu, click **Options**.

2. Click the **Ordering** tab and then click **Online Booksellers**.
3. If you are connected to the Internet, the list of available booksellers is updated automatically. Select the booksellers you want from this list and then click **Up** and **Down** to set the preferred search order.

Hint: If you choose several booksellers, Citavi goes through the list in the order shown to check if the book is available. An order page is shown only for the first bookseller found that carries the book.

Ordering a Book from an Online Bookseller (Ordering Online)

1. Switch to the **Reference Editor** and verify that the book has an ISBN number.
2. Click **Tasks & Locations**.
3. Click **Order** and then click **Online**.
4. Citavi searches for the book in the catalogs of the selected booksellers. Your Web browser will then open the book's page on the bookseller's online store so you can place an order.

Ordering a Book from your Local Bookstore (Ordering via E-mail)

1. Locate the reference in the **Reference Editor**.
2. Click **Tasks & Locations**.
3. Click **Order**, and then click **Book by E-mail**.
4. Citavi copies the bibliographic information of the current reference, along with a default message, into a new e-mail message, provided you have an e-mail program such as Outlook or Thunderbird installed and configured. The message will be addressed to the bookstore set in the **Options** menu. To configure the address and the default message, on the **Tools** menu, click **Options**. Click the **Ordering** tab and enter the e-mail address in the **Bookseller order by e-mail** field and the default message into the **E-mail text for bookseller orders** box.
5. In your e-mail program, edit the message if necessary and then send it.

Ordering an Article

1. Locate the reference in the **Reference Editor**.
2. Click **Tasks & Locations**.
3. Click **Order** and then click **Other by E-mail**.
4. Citavi copies the bibliographic information of the current reference, along with a default message, into a new e-mail message, provided you have an e-mail program like Outlook or Thunderbird installed and configured. The message will be addressed to the service provider set in the **Options** menu. To configure the address and the default message, on the **Tools** menu, click **Options**. Click the **Ordering** tab and enter the e-mail address in the **Other order by e-mail** field and the default message into the **E-mail text for other orders** box.
5. In your e-mail program, edit the message if necessary and then send it.

11. Retaining and Organizing Knowledge

Citavi offers many tools to help you extract important ideas from the references you collect and then to organize this material in a meaningful way.

If you often work with texts in digital format, we recommend using the Citavi Preview function. The Preview lets you read and annotate PDF files from within Citavi. You can also highlight sections of a PDF and transfer them to your project as abstracts, tables of contents or quotations.

In this chapter you will learn how to:

- Add abstracts, comments, and "cited by" references
- Save quotations and keep track of thoughts
- Use categories to place your materials in context
- Organize and print quotations and thoughts

11.1 Writing Abstracts and Comments

If you are working with a large number of sources, abstracts and personal evaluations help you remember what you've read. An **abstract** is a short summary of a work. An **evaluation** contains your own opinion about a work.

In this chapter you will learn how to:

- Write an abstract
- Use the evaluation function in Citavi
- Document who has cited or reviewed whom

11.1.1 Creating and Saving Abstracts

An abstract provides a brief summary of the topic, the approach, the purpose, the most important findings and sometimes possibilities for future research. It should be written concisely and objectively. (Your own opinions and critical evaluations should be recorded under **Comments**.)

When writing an abstract, keep the following points in mind:

1. Briefly summarize the contents of the text by describing the main topic, arguments and scope.
2. Identify the work's context within the discipline: what lines of thinking does it continue? Which methods were used and/or what theoretical stance does the author take?
3. Determine the author's contributions to the research: what are the key contributions of the work? What are the author's major findings? What questions remain open for investigation?

Adding an Abstract

If you're writing an abstract yourself, put your name and the date in brackets at the beginning of the abstract so that you do not forget that you are the author.

1. In the **Reference Editor**, click the **Contents** tab.
2. Type the abstract into the **Abstract** field. To use text formatting (i.e. bolding, italics, etc.), click the blue **Abstract** label or press **F9**.

Adding an Existing Abstract from the Preview

Many journal articles in electronic form already include an abstract. If this is the case, you can easily copy it into Citavi.

1. Click the name of the linked file to show it in the preview pane.
2. Highlight the abstract in the preview pane.

3. In the preview pane, click **Abstract**.

Adding an Existing Abstract from Another Program

1. Copy the abstract to the Clipboard. In Citavi, switch to the **Reference Editor**.
2. In the **Reference Editor**, click the **Contents** tab.
3. Click in the **Abstract** field and on the **Edit** menu, click **Paste**, or press **Ctrl+V**.
4. If you want to format the text, click the **Abstract** label or press **F9**.

Hint: To preserve the formatting of the original text when pasting, press **F9** to open the advanced text editor, and then press **Ctrl+Shift+V** to paste as formatted text. To remove all character formatting, press **Ctrl+Space**. To remove all tabs and line breaks, press **Ctrl+Shift+Space**.

11.1.2 Evaluating a Reference

You can write an evaluation for each reference in your project on the **Contents** tab. Evaluations and ratings primarily help you to assess how important a work is to your project.

You can also print a list containing your comments to give to students as a recommended reading list. For example, you could provide a list of references with notes such as "good introduction to topic X," "seminal work," "recommended for advanced study on topic Y," etc. See Creating an Annotated Project Bibliography.

Writing an Evaluation

1. Switch to the desired reference in the **Reference Editor**.
2. Click the **Contents** tab.
3. Type your evaluation in the **Evaluation** box.

Applying a Rating

In addition to or instead of an evaluation, you can apply star ratings to a reference. You can decide for yourself what the rating should stand for.

1. Open the reference in the **Reference Editor**.
2. Switch to the **Content** tab.
3. Click the stars to apply. To clear a star rating, click just to the left of the stars.

Hint: In the table view you can sort your references by star rating.

11.1.3 Documenting Relationships

Reviews are often useful for your research since they critically examine and evaluate new publications and research results. Familiarity with reviews can give you a deeper understanding of the original text's contents and context.

You can use Citavi to document the links between a review and the original work. Just make sure that both works (the reviewed work and the review itself) are saved in your project.

Author A Reviews Author B

1. In the Reference Editor, switch to the reference by Author A.
2. Click the **Context** tab.
3. In the **This reference links to** area, click **New link** ( ).
4. On the **To** menu, click the reference by Author B.
5. Insert the page numbers if needed.
6. To evaluate whether the review was positive or negative, click the scale.

7. If you want, insert an explanatory note and click **OK**.

Author A is Reviewed by Author B

If you come across publication that discusses a work that is already in your project, you can document this relationship by using **This reference is linked from**.

1. In the Reference Editor, switch to the reference by Author A.
2. Click the **Context** tab.
3. In the **This reference is linked from** area, click **New link** ( ).
4. On the **From** menu, click the reference by Author B.
5. Insert the page numbers if needed.
6. To evaluate whether the review was positive or negative, click the scale.
7. If you want, insert an explanatory note and click **OK**.

11.2 Adding Quotations

Citavi not only helps you manage the bibliographic information for your sources but also helps you to synthesize and organize their contents and combine this information with your own ideas. This information can then be utilized in your publication.

In this chapter you will learn about:

- Basic principles of citation
- Citation types you can use in Citavi
- Why to avoid secondary quotations
- How to edit quotations
- How to add thoughts

11.2.1 Basic Principles of Citation

An important component of academic research includes the publishing of results to make them available for review by a wider audience.

A further aspect is that you must explain and defend your own research and results. This requires an in-depth evaluation of other research approaches and opinions.

An important prerequisite for this step is **excerpting**, that is, using passages from others' work. The purpose is to provide evidence for your statements that can be verified by others.

Excerpts are generally provided in the form of quotations. There are two kinds of quotations: direct and indirect quotations. In a **direct quotation**, a passage of a source text is copied word-for-word and placed in quotation marks. Changes to the wording are permissible only if placed in brackets [ ] to mark the added section and as long as the meaning of the quotation is not altered by the addition. In an **indirect quotation**, you summarize the ideas of the source text *in your own words* so quotation marks are unnecessary.

In both types of quotations, it is critical to document the source fully and precisely by noting the title, author, page numbers, and any other pertinent information.

When you collect quotations or excerpts for a research project, it makes sense to distinguish between two situations:

1. You are reading from a more general text such as a survey textbook or a standard work. In this case, excerpt only the sections that are of immediate relevance to the problem or thesis of your work.
2. You are reading from subject literature, normally for a specific purpose, for example, preparing a talk. In this case, you might look at details and claims that you want to agree with or criticize. The excerpt serves as material for your own research.

In the **Reference Editor**, on the **Quotations** tab, Citavi lets you create and manage an unlimited number of quotations from a reference.

When you add an excerpt, there is a dedicated field for the **core statement**. This makes it easier for you to quickly recognize the content and significance of the excerpt later on. You can also organize your quotations by using keywords. By assigning your quotations to categories you can further structure them.

11.2.2 Quoting a Text Passage

Citavi distinguishes between different types of quotations and provides fields for each type:

- **Direct Quotation** for information that you type in exactly as it appears in the original text (ex. a definition)
- **Indirect Quotation** for information that you reformulate in your own words (paraphrase)
- **Summary** a short description of the contents of a chapter or section
- **Comment** for your thoughts on an author's statements
- **Image or file quotation** for graphics, film or music files that you take from other works.

Hint: Use the **Comment** function to distinguish between the author's thoughts and your own. You can add a comment to a quotation that you have already added. Highlight the quotation, click the arrow to the right of **Comment**, and then click **Add comment to item**.

Adding a Text Quotation

1. In the **Reference Editor**, switch to the **Quotations** tab of the reference you want to quote.
2. Click **Direct quotation**.
3. In the window that appears, you will see the short title of the reference. Enter the page numbers the quotation is taken from in the **Page range** field.
4. Type the quoted text into the **Quotation** box. Do not forget to place direct quotations in quotation marks!
5. Write a concise summary of the quotation in the **Core statement** field. If you do not enter anything, Citavi will automatically enter the first few words of the quotation. You can turn off this feature in the **Options** menu.
6. Click **Categories** or press **F3** to assign categories to the quotation. Select the checkboxes for the categories you want to assign. (See Outlining with Categories.)
7. The **Modified** field will automatically update with your initials and the date. Click **OK** to finish.

Citavi shows quotations in a list, sorted by ascending page order. Click the green triangle to see either the core statement only or both the core statement and the text of the quotation.

Adding an Image or File Quotation

1. In the **Reference Editor**, switch to the **Quotations** tab of the reference you want to quote and click **Image or file**.
2. In the window that appears, you will see the short title of the reference. Enter the page numbers the quotation is taken from in the **Page range** field, if applicable.
3. Click **Add file**. Choose the file and click **Open**. Click **Image** and then click **Insert image file** and locate the image file on your computer. Citavi will show previews of the following image types:

- Windows Bitmap (.bmp)
- TIFF (.tif, uncompressed or with LZW compression)
- JPEG (.jpg)
- GIF (.gif)
- PNG (.png)

4. Citavi will save a thumbnail of any images that can be previewed, in case the original file goes missing. Other file types, such as movie files, can be attached, but will not have a preview and no thumbnail can be saved.
5. Citavi enters the file path in the **Location** field.

6. Complete the rest of the fields. Click **Categories** or press **F3** to assign categories to the quotation. Select the checkboxes for the categories you want to assign.
7. Enter a **Caption** for later publication and a longer **Description** for your own use. Click **OK** to finish.
8. The **Modified** field will automatically update with your initials and the date. Click **OK** to finish.

Hint: For videos, you can enter a time span, such as 01:34-03:55 by clicking **Page range** and choosing **Other** as the numbering type.

11.2.3 Quoting Secondary Quotations

Citavi does not distinguish between primary and secondary quotations. Secondary quotations — that is, quotations that are taken from a source other than the original source — are best avoided in scholarly writing and should only be used if it is impossible to obtain the original source.

To use secondary quotations in Citavi, you must apply some creative thinking, as illustrated by the following example:

You have a book by Müller from 2006 which contains an interesting quotation by Schmidt that you want to use. On page 14 of Müller, you find:

> According to Schmidt, "the power of facts has led to more laws than the legislature wants to accept" (Schmidt 1994, p. 84).

To use the Schmidt quotation in your writing, you must add both references (Müller and Schmidt) to Citavi. The reference to Schmidt is in Müller's bibliography, and you should be sure to verify the accuracy of this reference in a library catalog or other database.

To cite the secondary quotation, add the Schmidt quotation to the Müller reference. It would be dishonest to add it to the Schmidt reference, because you have not actually consulted the original work. So, to Müller, you would add your quotation as follows:

> "The power of facts has led to more laws than the legislature wants to accept" (Schmidt 1994, p. 84 as quoted by Müller 2003, p. 14).

As you see, secondary quotations require a little extra thought. Again, they are best avoided and should only be used as a last resort when the original source cannot be consulted.

11.2.4 Editing a Quotation

You can edit Quotations in both the **Reference Editor** and the **Knowledge Organizer**. The **Knowledge Organizer** shows you all the quotations (and thoughts) in your entire project, while the **Reference Editor** shows you only those belonging to the current reference.

In the Reference Editor

1. Switch to the reference containing the quotation you want to edit.
2. Click the **Quotations and comments** tab.
3. In the list, click the quotation you want to edit.
4. Double-click the quotation (or right-click it and choose **Edit quotation or thought**) to open the editing window. Make the desired changes and click **OK** to finish.
5. Right-click to open the shortcut menu and select:
   - Assign categories to use categories to organize your project.
   - Quote with placeholder to copy the quotation and its placeholder to the Clipboard.
   - Delete quotation to permanently remove the quotation.

In the Knowledge Organizer

The upper part of the window shows you your categories as an outline, with the number of quotations and thoughts assigned to a category in parentheses. You can also show the number of references in a category by turning on **Show Number of References** on the **View** menu. The lower part of the window shows the quotations and thoughts.

1. In the list, click the quotation you want to edit.
2. Double-click the quotation (or right-click it and choose **Edit quotation or thought**) to open the editing window. Make the desired changes and click **OK** to finish.
3. Right-click to open the shortcut menu and select:
   - Assign categories to use categories to organize your project.
   - Quote with placeholder to copy the quotation and its placeholder to the Clipboard.
   - Delete to permanently remove the quotation.
   - Edit to switch to the Reference Editor and edit the reference.

You can also drag a quotation to the category you want to assign it to.

Copying a Quotation

1. Copy the quotation to the clipboard:
   - To duplicate a quotation to a new location (for example, to another project), click the quotation to select it and press **Ctrl+C**.
   - To move a quotation without duplicating it (for example, to move it from one reference to another), select the quotation and press **Ctrl+X**.
2. Switch to the reference you want to add the quotation to and press **Ctrl+V** to paste it.

11.2.5 Adding Thoughts

The thoughts feature in Citavi lets you save and manage comments and explanations about any reference, topic, or project you are working on. By assigning categories to thoughts, you can create a web of relationships that can help you structure your ideas and arguments. We recommend using the **Knowledge Organizer** to record your thoughts.

If you have assigned a category to a quotation, you can place a thought directly after it in the list of quotations. If a quotation or group of quotations does not have any categories assigned to it, then thoughts will be added to the end of the **No categories** list. Please note that these uncategorized thoughts and quotations cannot be sorted.

Adding a Text Thought

1. In the **Reference Editor** or **Knowledge Organizer**, click **Thought** in the toolbar, or press **Ctrl+I**.
2. Enter your thoughts into the window that opens.
3. In the **Core Statement** field, type a concise formulation of the central idea of the thought.
4. In the **Keywords** field, apply keywords that describe the main idea of the thought.
5. In the **Categories** field, assign one or more categories that help establish relationships with other quotations or thoughts.
6. The **Modified** field will automatically update with your initials and the date. Click **OK** to finish.

Adding an Image or File Thought

1. In the toolbar, click the arrow next to **Thought** and then click **Image or file**, or press **Ctrl+Shift+I**.
2. Click **Add file**.
3. Locate the file on your computer. Citavi will insert the file location in the **Path** field.
4. Complete the rest of the fields. Enter a **Caption** for later publication and a longer **Description** for your own use. Apply **Keywords** and assign **Categories** as necessary. Click **OK** to finish.

Double-click the preview image to open the original file in the default program. To delete the image, click to select it and then on the **Edit** menu, click **Delete**.

Editing a Thought

1. Switch to the **Knowledge Organizer**.
2. Double-click the thought you want to edit. You can also right-click it and select **Edit** on the shortcut menu.
3. Edit the fields you want to change and click **OK** to finish.

Copying a Thought to Another Project

1. Switch to the **Knowledge Organizer**.
2. Click a thought to select it. (To select multiple thoughts, hold the **Ctrl** key and click each thought.)
3. Right-click a selected thought, and then click **Copy**, or press **Ctrl+C**.
4. Switch to the project you want to add the thought to and switch to the **Knowledge Organizer**.
5. Press **Ctrl+V** to insert the thought.

11.3 Outlining with Categories

Category management is at the core of Citavi. Categories allow you to group references, quotations and thoughts that are related in some way and are extremely helpful in the writing process.

Category systems are in essence the same as outlines. An effective writing process requires a clear vision of the topic, problem, the object being studied, and the intended statement, and the outline should reflect this vision. Of course, as you write your ideas will evolve and your outline will necessarily change as well. Citavi's category management functions support you throughout this process and provide the flexibility to continuously update your category system.

You can create a category system for any Citavi project and modify it at any time. A category system can also be copied to other Citavi projects or exported to a word processor (for example, Microsoft Word) or to a mind mapping program. Citavi can even import a Microsoft Word outline as a category system, as long as certain conditions are adhered to.

In this chapter you will learn how to:

- Create a category system in Citavi
- Assign a category to a reference, a quotation, or a thought
- Import and export category systems

11.3.1 Creating Categories

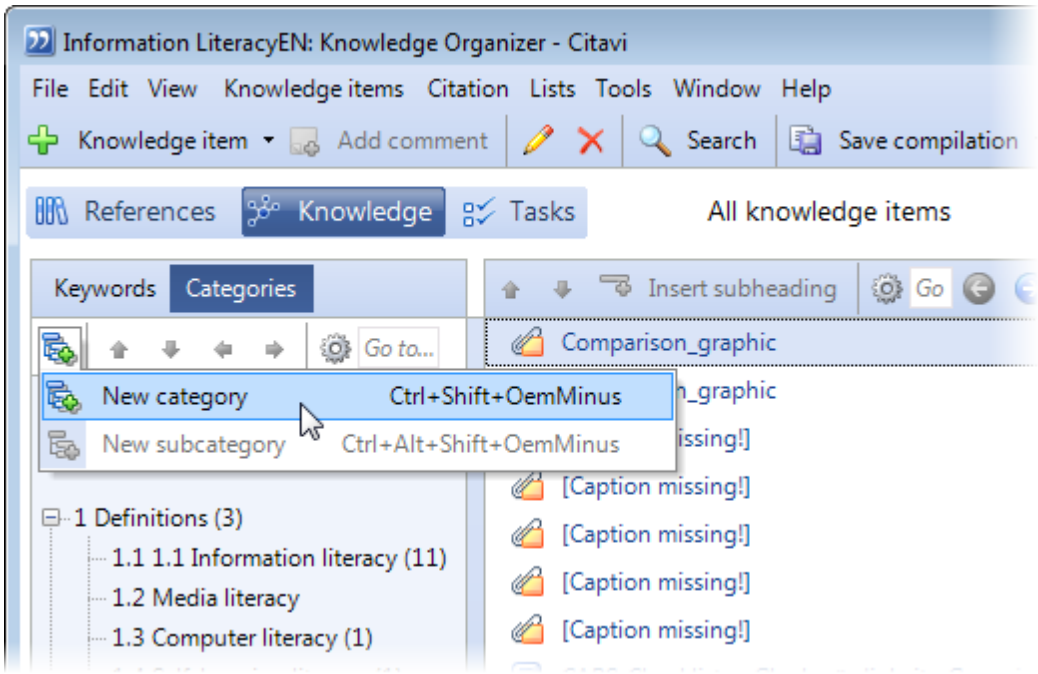
You can create a category system either in the **Reference Editor** or in the **Knowledge Organizer**.

Creating Categories in the Reference Editor

1. In the **Reference Editor**, switch to the **Context** tab. Or click the the double arrow icon in the bar over the navigation area to show a fourth column with categories and key words. You can also switch to the **Quotations** tab and double-click a quotation to open it.
2. Click **Categories**.
3. Click **New Category** or **New Subcategory**.
4. Type the name of the category.

Creating Categories in the Knowledge Organizer

1. Switch to the **Knowledge Organizer**.
2. Click the **New Category** or **New Subcategory** icon above the category list.
3. Type the name of the category.



To change the position of the category in the system, click one of the blue arrows in the taskbar or open the context menu by right-clicking. You can move the categories up or down in the list or promote or demote them.

To change the name of a category, click the category and press **F2**. You can also open the shortcut menu by right-clicking and clicking **Edit**.

To merge two categories, press and hold **Alt** while dragging the category to the category you want to merge it with. Or open the shortcut menu by right-clicking and then click **Merge**.

11.3.2 Assigning Categories

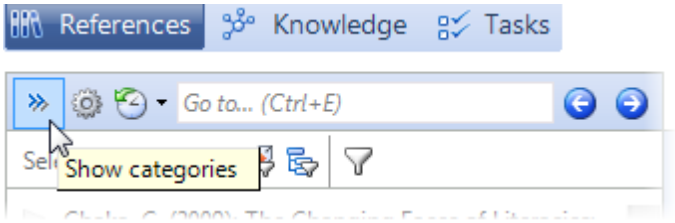
Categories help you organize references, thoughts, or quotations in your project.

Assigning Categories to a Reference

1. Switch to the **Reference Editor**.
2. Click the **Context** tab.
3. Click **Categories**.
4. Select the checkboxes for the categories you want to assign.
5. Click **OK** to finish.

Assigning a Category to Multiple References in the Reference Editor

1. Click **Show categories** in the toolbar above the navigation area to show the categories column.



2. Hold **Ctrl** and click the references to select them.
3. Drag any of the selected references to the category you want to assign to all the references.

Assigning Categories to Multiple References in the Table View

1. Switch to the **Reference Editor**.
2. Click **Table**.
3. Hold the **Ctrl** key and click the references to select them.
4. On the **References** menu, point to **Batch modify** and click **Assign categories**.
5. Click the category you want to assign (or hold the **Ctrl** key and click to select multiple categories).
6. Click **OK** to finish.

The **Knowledge Organizer** lets you see all of your thoughts and quotations arranged by category. You can also print this overview as a compilation.

Assigning Categories to a Quotation

1. Switch to the **Reference Editor**.
2. Click the **Quotations** tab.
3. Double-click a quotation to edit it.
4. Click **Categories**.
5. Select the checkboxes for the categories you want to assign.
6. Click **OK** to assign the categories.

Assigning Categories to a Thought

1. Switch to the **Knowledge Organizer**.
2. Double-click a thought to edit it.
3. Click **Categories**.
4. Select the checkboxes for the categories you want to assign.
5. Click **OK** to assign the categories.

11.3.3 Importing and Exporting Categories

When you start a new project, you can import your category system from an existing Citavi project or an outline from another program.

You can export the categories you create in Citavi to Microsoft Word, OpenOffice.org Writer, ConceptDraw, FreeMind, or Mindjet MindManager Pro. This way you can keep using the categories as an outline in the word processor or MindMapping program.

Importing a Category System from Another Citavi Project

1. Switch to the **Knowledge Organizer**.
2. Click **Categories**.
3. In the toolbar above the navigation area, click **Tools** ( ), point to **Import category system** and click **From a Citavi project**.
4. Locate the project you want to copy the category system from and click **Open**.
5. Citavi will copy the category system to the new project.

Importing a Category System from a Word Processor

You can create an outline in Microsoft Word or OpenOffice.org Writer and then import it to Citavi, provided you use default styles (that is, *Heading 1*, *Heading 2*, etc.) in the word processor.

1. Save the Microsoft Word or OpenOffice.org Writer document.
2. Switch to Citavi and open the project you want to import the outline into.
3. Switch to the **Knowledge Organizer**.
4. Click **Categories**.
5. In the toolbar above the navigation area, click **Tools** ( ), point to **Import category system** and click **From a Word document** or **From a Writer document**, respectively.
6. Choose the document and click **Open**.
7. Citavi imports the outline into your project as a category system.

Exporting a Category System to a Word Processor

1. Switch to the **Knowledge Organizer**.
2. Click **Categories**.
3. In the toolbar above the navigation area, click **Tools** ( ), point to **Export category system** and click **To Word** or **To Writer**, respectively.
4. Citavi creates a new word processing document and copies the category system as an outline.
5. In Word or Writer, you can edit the outline as needed.

Working with Mind Mapping Software

You can import outlines from mind mapping software into Citavi. Citavi can exchange data with ConceptDraw, FreeMind, and MindManager Pro (versions 6 and later).

Importing MindMaps®

1. Switch to the Knowledge Organizer
2. Click **Categories**.
3. In the toolbar above the navigation area, click **Tools** ( ), point to **Import category system** and click **From a ConceptDraw document**, **From a FreeMind document,** or **From a MindManager document**, respectively.
4. Choose the document and click **Open**.
5. Citavi imports the outline into your project as a category system.

Exporting a Category System to a Mind Mapping Program

1. In Citavi, switch to the Knowledge Organizer.
2. Click **Categories**.
3. In the toolbar above the navigation area, click **Tools** ( ), point to **Export category system** and click **To ConceptDraw, To FreeMind**, or **To MindManager**, respectively.
4. Name the file and click **Save**.
5. Import the file to your mind mapping program:
   - In **MindManager Pro**, on the **File** menu, point to **Import** and click **Import from MPX file**.
   - In **FreeMind**, on the **File** menu, click **Open**.
   - In **ConceptDraw**, on the **File** menu, point to **Import**, then **Text Outline**, and then click **Indented Outline**.

Note: MindManager does not have an import format of its own, and instead uses Microsoft Project Exchange (MPX) format. MPX was originally created for exchanging project management data. Note that MPX files created in Citavi are intended only for importing to MindManager Pro (version 6 or later) and cannot be imported to Microsoft Project. MindManager Lite cannot import or export MPX files.

11.4 Organizing and Printing Quotations and Thoughts

The **Knowledge Organizer** lets you organize quotations and thoughts and print them as needed.

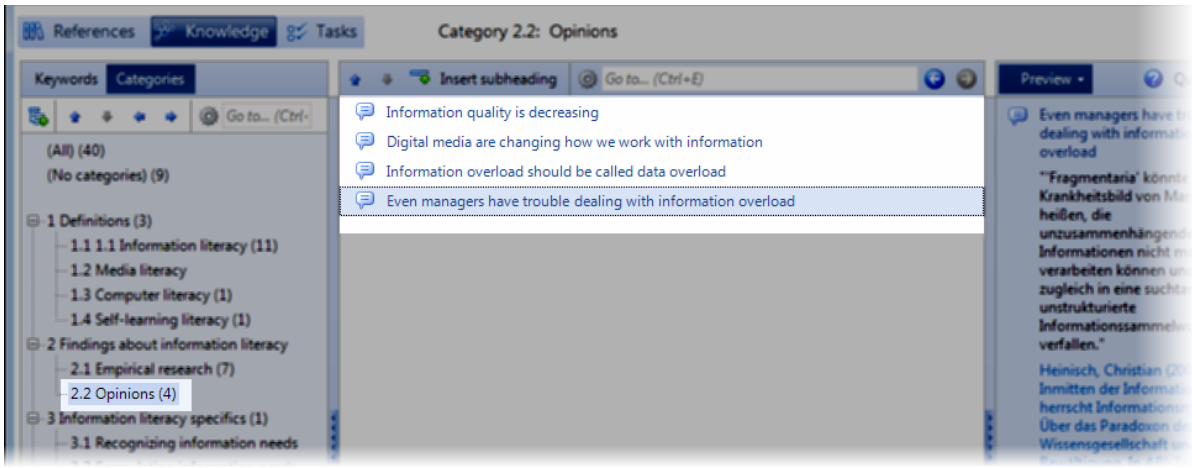
In this chapter you will learn how to:

- Organize thoughts and quotations with categories
- Print a compilation of thoughts and quotations
- Quickly give someone else a quotation and its source information

11.4.1 Organizing Quotations and Thoughts Manually

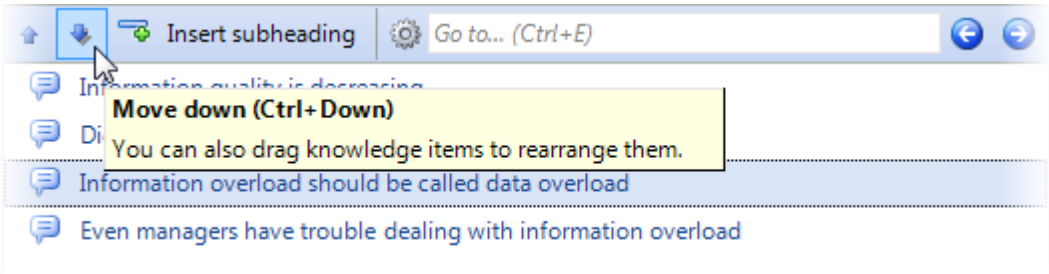
You can perform an initial sort of the quotations and thoughts you add to a reference by assigning categories to them. You can then expand or change this organization at any time. To do so, either create new categories, or edit the categories already assigned to quotations and thoughts.

To see the quotations and thoughts in a particular category, switch to the **Knowledge Organizer** and click the category name in the navigation pane. The editing pane will show the contents of the category in a list:

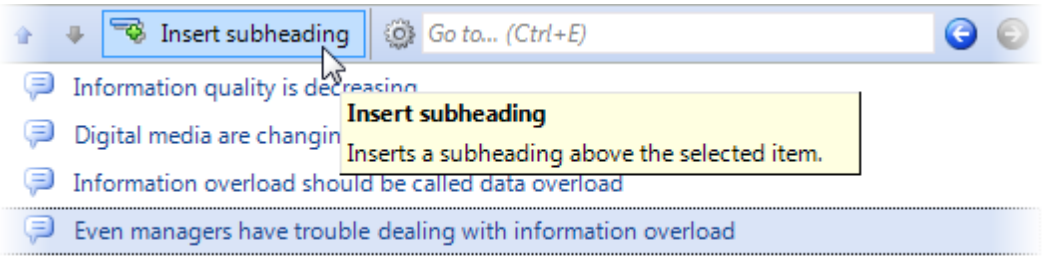


If you want to organize knowledge items within a category, you can insert a subheading above the highlighted

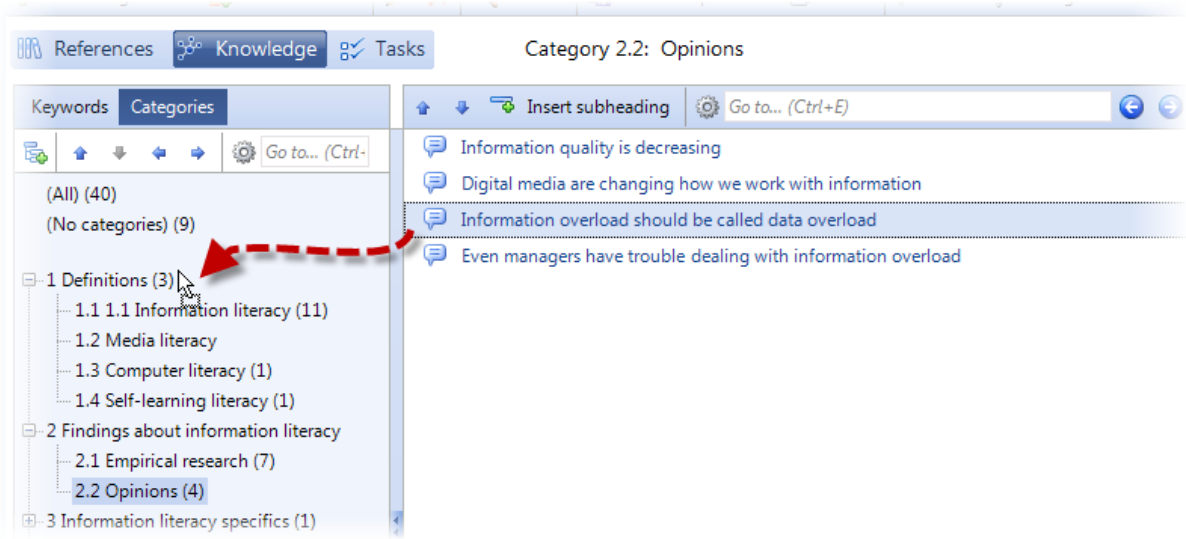
quotation or thought.


Insert subheading
Go to... (Ctrl+E)
Move down (Ctrl+Down)
You can also drag knowledge items to rearrange them.
Information overload should be called data overload
Even managers have trouble dealing with information overload

To change the order of the quotations and thoughts in the list, click the entry you want to move and then click the up or down arrows in the toolbar. You can hold the **Ctrl** key and click several entries to select them and move them all at once.


Insert subheading
Go to... (Ctrl+E)
Information quality is decreasing
Digital media are changin
Insert subheading
Inserts a subheading above the selected item.
Information overload should be called data overload
Even managers have trouble dealing with information overload

To add categories from a quotation or thought, drag the quotation or thought to the desired category in the navigation pane.



You can also right-click the quotation or thought and then click **Assign Categories** in the shortcut menu that appears. Select or clear the checkboxes for the categories you want to add or remove. To remove a category, double-click the quotation or thought, then place the insertion point in the **Categories** field and press **F9**. Clear the checkbox for the category.

New thoughts appear in one of two ways in the **Knowledge Organizer**:

- If the thought does has not had a category assigned to it, Citavi will place the thought at the end of the lists **All** and **No categories**.
- If a quotation or another thought is highlighted, the thought will be placed below the highlighted quotation or thought.

11.4.2 Printing a Compilation of Quotations and Thoughts

You can print all of your quotations (both text and image) and thoughts. If you have used categories to group quotations and thoughts, the items will be grouped accordingly.

Saving Quotations and Thoughts as a Compilation.

1. Switch to the **Knowledge Organizer**.
2. On the **File** menu, click **Save compilation**. Alternatively, click **Save compilation** on the toolbar or press **F12**.

Saving Quotations and Thoughts with Options

1. Switch to the Knowledge Organizer.
2. On the **File** menu, point to **Save compilation**, and then click **Save with options**.
3. In the **Compilation** window that appears, select:

   The knowledge items you want to include in the compilation:

   - **All knowledge items in the project**
   - **Knowledge items in the current category and its subcategories**, if you have categories selected
   - **Knowledge items in the current category**, if you have categories selected and do not want to include subcategories
   - **The n selected knowledge items**, if you have quotations or thoughts selected
   - **Formatted: With references and bibliography in selected citation style** to print a finished compilation, including a bibliography. A finished compilation is useful for showing your work in progress to someone else.
   - **Preliminary: With placeholders** for later use with Format publication to print a preliminary compilation with no bibliography and with placeholders instead of citations.
   - Whether to **Include core statements** of quotations as headings.
4. Click **OK** to save the compilation.

11.4.3 Citing Quickly

Usually you will insert your quotations into your document using the Publication Assistant. If you just need a single quotation and its source information, you can also use the Clipboard. This can be useful if you want to let one of your colleagues know about a text passage, for example.

Copying a Quotation with its Source

1. In the Reference Editor, switch to the **Quotations** tab. Or highlight the quotation or thought in the Knowledge Organizer.
2. In the toolbar, click **Cite** and then click **Copy to Clipboard**.
3. Switch to your document and place the insertion point where you want to insert the text. Press **Ctrl+V** to paste the quotation.

12. Creating Publications

When you write a research paper, presentation, dissertation or article, you take the information you have gathered, synthesize it, and use it to support your own arguments. Your publication presents the results of your examination of a specific research problem and must be explained and supported. To do that you need to both quote from your sources and to identify which sources and you have used in your research.

There are two ways you can format your publication using Citavi.

For a shorter document that only contains a few quotations and citations, you can use the clipboard to insert formatted quotations and ideas directly into your publication. See Citing quickly for more information. You can create a formatted list of selected references in Citavi with just a couple clicks and paste it into your document. See Creating a simple project bibliography.

For longer documents, we recommend using the Publication Assistant. The Publication Assistant allows you to insert citations, thoughts, and quotations with a few clicks of your mouse. When you format your publication, Citavi automatically create a bibliography for all sources cited.

In this chapter you will learn how to:

- Quickly create a formatted list of selected references
- Insert quotations into a word processor and then automatically create a bibliography of the sources used

12.1 Creating a Project Bibliography

In Citavi, a **project bibliography** is a quick compilation of bibliographic information. You can quickly print a project bibliography to give to others as a reading list, or as notes to take with you to a library when doing additional research.

In this chapter you will learn how to:

- Create a simple project bibliography of selected references
- Create an annotated project bibliography
- Create a project bibliography grouped by categories, keywords, or other criteria

Please keep in mind that a project bibliography differs from a **publication bibliography**, which is the finished bibliography specific to your publication. See Creating a Publication with Word or Writer.

12.1.1 Creating a Simple Project Bibliography

In Citavi, a **Project Bibliography** is a list of references created independently of a paper you are writing — it includes all references in your project, regardless of whether or not they might be used in your research project. A project bibliography can also include additional information beyond that required by the selected citation style.

Printing a Simple Project Bibliography of All References

1. In the **Reference Editor**, click **Print** in the toolbar or press **Ctrl+P**.
2. Click the printer icon or press **Ctrl+P** to send the project bibliography to the printer.

Printing a Simple Project Bibliography of a Selection of References

1. In the **Reference Editor**, choose the references that you want to appear in the project bibliography, for example by using Quick Select. If you only want to print one reference, right-click it and then click **Apply as selection**.
2. Click the printer icon or press **Ctrl+P** to send the project bibliography to the printer.

12.1.2 Creating an Annotated Project Bibliography

In Citavi, an annotated project bibliography contains bibliographic information as well as any other information you want to include, such as abstracts, quotations, comments, locations, or keywords.

Saving an Annotated Project Bibliography

1. In the **Reference Editor**, choose the references that you want to appear in the project bibliography, for example by using Quick Select.
2. In the toolbar, click the arrow to the right of **Save project bibliography**.
3. Click **Annotated project bibliography**.
4. Select the categories you want to group references by and change the sort order by clicking the **Move up** and **Move down** arrows.
5. Click **OK**.
6. Type a file name, and click **Save** to save the project bibliography as a text file.

Printing an Annotated Project Bibliography

1. In the **Reference Editor**, choose the references that you want to appear in the project bibliography, for example by using Quick Select.
2. In the toolbar, click the arrow to the right of **Print** in the toolbar.
3. Click **Annotated project bibliography**.
4. Select the categories you want to group references by and change the sort order by clicking the **Move up** and **Move down** arrows.
5. Click **OK**.
6. Click the printer icon or press **Ctrl+P** to send the annotated project bibliography to the printer.

12.1.3 Creating a Grouped Bibliography

A grouped project bibliography allows you group bibliographic references by document type, keywords, categories, tasks, and custom fields. Within the groups the entries are sorted alphabetically.

Saving a Grouped Project Bibliography

1. In the **Reference Editor**, choose the references that you want to appear in the project bibliography, for example by using Quick Select.
2. In the toolbar, click the arrow to the right of **Save project bibliography**.
3. Click **Grouped project bibliography**.
4. Select the categories you want to group references by and change the sort order by clicking the **Move up** and **Move down** arrows.
5. Click **OK**.
6. Type a file name, and click **Save** to save the project bibliography as a text file.

Printing a Grouped Project Bibliography

1. In the **Reference Editor**, choose the references that you want to appear in the project bibliography, for example by using Quick Select.
2. In the toolbar, click the arrow to the right of **Print** in the toolbar.
3. Click **Grouped project bibliography**.
4. Select the categories you want to group references by and change the sort order by clicking the **Move up** and **Move down** arrows.
5. Click **OK**.
6. Click the printer icon or press **Ctrl+P** to send the grouped project bibliography to the printer.

12.2 Creating a Publication with Word or Writer

It is expected that a research publication will cite every source used, correctly and consistently. This is the purpose of a bibliography. Authors themselves must strive for accuracy and completeness, while consistency is maintained by adhering to a citation style. Usually the organization, publisher or professor will specify the citation style you must use when you submit your work.

Citavi can help you automatically generate a bibliography specific to your publication, as long as you first use the Publication Assistant. This allows Citavi to mark in-text citations or footnotes with placeholders. Later each placeholder is converted into an in-text citation or footnote in the citation style you need and a bibliography of all cited sources is added to the end of your document.

In this chapter you will learn how to:

- Use the Publication Assistant to insert references, quotations and thoughts into Word or Writer documents
- Insert references into your document
- Insert a quotation or thought into your document.
- Use additional options for special cases
- Automatically create a bibliography specific to your publication

12.2.1 The Publication Assistant

The Publication Assistant is a floating window that shows you a compact view of the contents of your Citavi project while you write your paper. By double-clicking you can directly insert a placeholder for a citation, a complete quotation and its placeholder, or a thought into an open Word or Writer document.

Placeholders

Creating a publication with Citavi is a two-step process. Initially, Citavi inserts **placeholders** instead of formatted citations, for example, {Smith 2010 #123: 33}. Then, in the second step, the placeholders are replaced with the correct, properly-formatted in-text and/or footnote citations, and a document bibliography is inserted at the end. By separating these steps, you ensure consistency in the final publication. It also gives you the flexibility to change citation styles without having to manually rewrite each citation in the manuscript.

Anatomy of a Placeholder

A placeholder consists of a short text that identifies the reference, enclosed in braces { }. The placeholder text can contain several kinds of identifying information that can be used alone or in combination:

- Year
- Author
- Words from the short title
- Sequence number

For example, a placeholder for the reference "Normal, Donald A: The Design of Everyday Things. New York 2002." could be:

```
{Norman 2002 #142}
```

The sequence number is the unique identifier for each individual reference in a project, and is shown in the status bar at the bottom of the Citavi window. When you use the sequence number in a placeholder, the other identifying information is ignored because the sequence number positively identifies a reference. This allows Citavi to distinguish between two publications by the same author written in the same year. For example, from `{Miller 2010 #50}` and `{Miller 2010 #72}` Citavi can format the references as (Miller 2010a) and (Miller 2010b).

Page numbers for a quotation are inserted with colon after the sequence number:

```
{Luhmann 1997 #138:97-98}
```

Tabs in the Publication Assistant

To open the Publication Assistant, on the **Citation** menu, click **Publication Assistant**, or press **F7**. The Publication Assistant has two tabs: **References** and **Knowledge items**.

Hint: Click **Float** on the toolbar of the Publication Assistant to keep the window floating over your word processor and to hide other Citavi windows.

Whenever you insert references, quotations or thoughts from Citavi into your document, be sure to place the insertion point in the spot where you want the text to be inserted.

The References Tab

The **References** tab shows you all the references in the current project. On the **View** menu you can set whether you want to view the references **by short titles**, **by titles**, **by categories**, or **by keywords**. You can also select whether to display sequence numbers or not.

To quickly find a reference, type letters corresponding to the first few letters in the title or author's name in the **Select** field. You can cancel this selection by clicking on the crossed out lasso to the right of the search box.

Click **Insert in Word** (or **Insert in Writer**) on the toolbar to insert a placeholder for the selected reference in the open Word or Writer document. You can choose whether to insert the placeholder normally, as a footnote, or with options. The placeholder will be inserted at the insertion point in the document. If you have multiple word processing files open, the front document will be used.

Hint: To set your preferred word processor, on the **Tools** menu, click **Options** and then select the Default word processor.

The Knowledge Tab

The **Knowledge** tab shows you all the quotations and thoughts in the current project. On the **View** menu you can set whether you want to view the references **by core statements**, **by titles**, **by categories**, or **by keywords**. We recommend the category view so that you can easily find and insert your collected knowledge items into the corresponding section of your publication.

To quickly find a particular quotation, type letters corresponding to the first few letters of the core statement in the **Filter** field. You can cancel this selection by clicking on the crossed out lasso to the right of the search box.

Click **Insert in Word** (or **Insert in Writer**) on the toolbar to insert the selected quotation (and a placeholder for its source) or thought in the open Word or Writer document. You can choose whether to insert the quotation's placeholder normally, as a footnote, or with options. The quotation or thought will be inserted at the insertion point in the document. If you have multiple word processing files open, the front document will be used. Thoughts do not include a citation, so when you insert one, no placeholder is inserted.

Hint: To insert a quotation or thought itself into a footnote (not just the placeholder), first create the footnote in your manuscript (**Ctrl+Alt+F** in Word), place the insertion point in the footnote, and then insert the quotation or thought.

12.2.2 Inserting References into a Publication

Using the Publication Assistant, you can easily insert references into your document. Depending on your settings, Citavi can insert the reference in the main body of the text or in a footnote.

Even though Word is used as the example below, the instructions also apply to OpenOffice.org Writer and OpenOffice.org Writer Portable.

Inserting Placeholders

1. In Citavi, open the project that you want to use for your document.
2. On the **Citation** menu, click **Publication Assistant** and switch to the **References** tab. Click **Float** on the toolbar of the Publication Assistant to keep the window floating over your word processor and to hide other Citavi windows.
3. Highlight the reference that you want to insert in your document
4. Switch to your document and place the insertion point in the spot where you want the placeholder to be inserted. Choose one of the following options:
   - To insert the placeholder directly into the body of your text, click **Insert in Word**.
   - To insert the placeholder as a footnote, click **Insert in Word as footnote.**
   - To insert with additional formatting options, click **Copy or insert with options**

Hint: You can also insert placeholders simply by double-clicking (and thus save a lot of time) if you first change your settings under **Tools** > **Options** > **General** > **Publication Assistant**.

Multiple Citations

Often, you will cite several sources for a single claim. Simply insert the placeholder for each reference directly beside the others and Citavi will automatically merge them into a multiple citation according to the selected citation style:

`{Norman 2002}{Nielsen 2000}{Tufte 2006}` becomes **(Norman 2002; Nielsen 2000; Tufte 2006)** using the Citavi Default Style.

To force Citavi to create individual citations for each reference, separate each placeholder with a non-breaking space (in Word, type **Ctrl+Shift+Space**).

Important: Notes such as "cf." must not be inside the placeholder. Make sure they are outside the braces to ensure the document formats correctly.

12.2.3 Inserting Quotations and Thoughts into a Publication

The best way to insert quotations and thoughts into your publication is by using the Publication Assistant. You can insert the quotation in the main body of your text and the citation and corresponding bibliography entry will be added automatically.

Though Microsoft Word is used as the example below, the instructions also apply to Writer and Writer Portable in the OpenOffice.org and LibreOffice suites.

Inserting Quotations and Thoughts

1. In Citavi open the project that you want to use for your document.
2. On the **Citation** menu, click **Publication Assistant** and switch to the **Knowledge Items** tab. Click **Float** on the toolbar of the Publication Assistant to keep the window floating over your word processor and to hide other Citavi windows.
3. Click the quotation or thought that you want to insert into your document
4. Switch to your document and place the insertion point in the spot where the quotation or thought should be inserted. Choose one of the following options:

- If you want to insert the placeholder directly into the body of your text, click **Insert in Word**.
- If you want to insert the placeholder as a footnote, click **Insert in Word as footnote.**
- If you want additional formatting possibilities, click **Copy or insert with options**

If you want to insert the citation placeholder into your publication rather than the full text of the quotation, switch to the **Knowledge Items** tab. On the **Citation** menu, click **Placeholder only**.

If you want to insert the core statement in addition to the quotation, switch to the **Knowledge Items** tab. On the **Citation** menu, click **Include core statement**.

12.2.4 Advanced Placeholder Options

The selected citation style dictates how citations appear in the formatted document. Occasionally, you will need to override a citation style default. Placeholder options let you tell Citavi how you need a citation to appear.

The following options can be entered in the manuscript manually, or in the **Format publication** window, you can find them on the **Format** menu.

/bibcit

Function: This option forces a full bibliographic citation to be used in a footnote or after a quotation.
Example: `{Luhmann 2004 /bibcit}` becomes: "Luhmann, Niklas: Law as a Social System. Oxford University Press 2004."

/textcit

Function: This option forces a full in-text citation. A common use is if you are using a citation style that calls for "ibid." on repeated citations, but you need a full citation instead.

The following example illustrates this situation: "`Luhmann {Luhmann 1993 /yearonly} describes our societies as social systems. See the following diagram: <Graphic> {Luhmann 1993 /textcit}`"
If the selected citation style requires "ibid." for repeated citations, the caption after the graphic would only be "ibid." Instead, the example manuscript produces "Luhmann (1993) describes our societies as social systems. See the following diagram: <Image> (Luhmann 1993)"

/footcit

Function: This option forces a footnote style citation.
Example: `{Luhmann 1997 : 27 /footcit}` becomes: "Luhmann, p. 27"

/personnonly

Function: A placeholder with this option is replaced with just the name of the author. The reference will be listed in the bibliography.
Example: `As {Luhmann 1997 /personnonly} explains in his groundbreaking work…` becomes: "As Luhmann explains in his groundbreaking work…".

/yearonly

Function: A placeholder with this option is replaced with just the year of publication. The reference will be listed in the bibliography.
Example: `Luhmann's two most famous works were published in {Luhmann 1997 /yearonly} and {Luhmann 1999 /yearonly}.` becomes: "Luhmann's two most famous works were published in 1997 and 1999."

/nopar

Function: Some citation styles place citations in parentheses. This option suppresses the parentheses.
Example: `According to {Luhmann 1997 /nopar}, this means that…` becomes "According to Luhmann 1997, this means that…".

Note: Citavi detects when a placeholder is already in parentheses and will then automatically suppress parentheses, so the /nopar option is often unnecessary. For example, `(See also {Luhmann 1993})` will be formatted by Citavi as "(See also Luhmann 1993)" There is no option to add parentheses because the citation style already defines whether they will appear or not.

/nobib

Function: This option allows you to cite a reference without listing it in the bibliography.
Example: `According to {Luhmann 1997 /nobib}, this means that…` becomes "According to Luhmann 1997, this means that…". The cited reference will not be listed in the bibliography.

/bibonly

Function: This option forces a reference to be listed in the bibliography without the insertion of an in-text citation.
Example: `After her death, her work was continued by her students. {Jones 2001 /bibonly}{Miller 2005 /bibonly}`

/page§

Function: With this option you can format numbers as paragraphs.

/pagecol

Function: With this option you can format numbers as column numbers.

/pagemargin

Function: With this option you can format numbers as margin numbers.

/pageother

Function: With this option you can format numbers the way "Other Numbers" have been defined in the citation style.

/pageroman

Function: With this option you can format numbers as lowercase Roman numerals.

/pageromanuc

Function: With this option you can format numbers as uppercase Roman numerals.

Combining Multiple Options

The Publication Assistant will never insert conflicting options in a placeholder. But it cannot prevent you from inserting them into a manuscript manually. Citavi has internal conflict resolution rules that dictate which options take priority if there is a conflict:

- **/personony** and **/yearonly** are mutually exclusive. In case of conflict, /personony takes priority and /yearonly will be ignored.

- **/personony** and **/nopar** can be combined: {Luhmann 1993: 234 /personony /nopar} becomes "Luhmann, p. 234".
- **/yearonly** and **/nopar** can be combined; {Luhmann 1993: 234 /yearonly /nopar} becomes "1993, p. 234".
- **/textcit** cannot be combined with **/personony** or **/yearonly**. /textcit takes priority and the other options will be ignored.

12.2.5 Formatting a Publication

When you format a publication, Citavi searches the placeholders in your document, replaces them with the correct formatting, and adds a bibliography.

Citavi works with documents created in Microsoft Word (2000 or later) and OpenOffice.org Writer (version 3 or later). However, you can work with other programs, too, as long as they save files in Rich Text or ODT format.

You can also format multiple documents at the same time. This is especially useful if you have broken up your publication into smaller documents, for example, one file for each chapter.

Formatting a Publication

1. Save and close the Word or Writer document.
2. In the **Reference Editor**, on the **Citation** menu, click **Format publication**.
3. Click **Add document** and select the files that make up the manuscript. Citavi scans each one for placeholders. Repeat if necessary until all the parts of the manuscript have been added.
4. After scanning the documents, Citavi shows a list of all the placeholders in the manuscript. If needed, correct broken placeholders.
5. Click **Format**.
6. You can change the order of the documents. Click the document you want to move and click the up or down arrow in the toolbar.

Placeholders that were successfully matched to a single reference appear with a green check mark. Broken placeholders appear with a red X. Broken placeholders are either ambiguous (placeholders that match multiple references) or do not match any references at all. Citavi creates a copy of your document and replaces all placeholders with the corresponding citation in the selected citation style, and according to any placeholder options you may have used. Citavi also creates a bibliography from the references cited in the publication.

Hint: You can speed up the formatting of Word documents by first saving them in RTF format directly in Word and then formatting them with Citavi.

Repairing Broken or Missing Placeholders

1. Click a broken placeholder. The preview displays the placeholder in context.
2. Click **Select reference**.
3. A search window opens. Find the correct reference and double-click it or click the reference and press **OK** to finish.

Note: When you fix a broken placeholder in the Format Publication window, it is not changed in the original manuscript. You may want to correct the broken placeholder in the original manuscript to ensure that you remain consistent if you reuse the manuscript, for example to format it in a different citation style. In most cases, adding the sequence number is the easiest way to positively identify a reference.

12.3 Creating a Publication with TeX

Citavi helps you create publications with the TeX typesetting system. Use BibTeX to do this: first, write your manuscript in a TeX editor, then place placeholders for citations (BibTeX keys) in the appropriate places, and finally generate the typeset publication from the TeX file (the manuscript) and the BibTeX file (the works cited). The TeX package you use determines the final formatting.

This chapter explains how to:

- Generate BibTeX Keys
- Generate a BibTeX File
- Use the Publication Assistant with TeX
- Insert Formulas in Quotations

Important: To use TeX features, you must first turn on support for TeX in the Citavi options: on the **Tools** menu, click **Options**, and then select the **TeX support** checkbox.

12.3.1 Generating BibTeX Keys

A BibTeX key is a unique identifier for a reference in a BibTeX file. To cite a reference in a TeX document, you insert the BibTeX key for the reference in the correct place in the document. When the document is converted to its final output format, the BibTeX keys are replaced with the correct, formatted citations.

Example:

Suppose your BibTeX file contains this entry:

```
@book{Andretta.2005
author = {Andretta, Susie},
year = {2005},
title = {Information literacy},
publisher = {Chandos},
address = {Oxford},
}
```

In your TeX document, you could insert the following citation command:

```
\cite{Andretta.2005}
```

When the document is converted, the following entry might be made in the bibliography:

Andretta, Susie (2005): *Information literacy.* Oxford: Chandos.

Generating a BibTeX Key in Citavi

1. On the **Tools** menu, click **Options**. On the **General** tab, select the **TeX support** checkbox and click **OK**.
2. Select which references Citavi should generate BibTeX keys for.
3. Switch to a reference. Edit the BibTeX key if needed.

Customizing BibTeX Key Templates

1. On the **Tools** menu, click **Options**. On the **General** tab, click **Customize** next to the selected **TeX support** checkbox.
2. To change the default template for all reference types, click **Default**.
3. Make the changes you want. You can change what fields are used to build the key, how they are formatted, the punctuation used, and conditional exceptions. If you want the punctuation between two elements to be hidden if an element is empty, insert the not sign (¬) before the punctuation by typing Alt+0172.
4. If you need certain reference types to have special BibTeX keys, you can define additional templates for each of them. Click **Add template for reference type** and then configure the template.
5. When you are finished making changes, click **OK**. Citavi asks what you want to do with existing BibTeX keys.

Note: Citavi does not automatically update BibTeX keys in existing references to ensure that BibTeX keys already used in TeX documents continue to be resolvable. If you want to generate BibTeX keys again, you can always click **BibTeX key** on the **Reference** tab.

Additional BibTeX Key Options

You can set additional options for your BibTeX keys under **Tools > Options > General**. Next to the selected **TeX support** checkbox, click **Customize** and then the **Tools** menu:

- Select **Normalize keys** to ensure that only characters in the ANSI character set are used, removing special characters such as umlauts: `Münchhausen 1796` becomes `Munchhausen.1796`.
- Select **Replace BibTeX keys when importing** to replace the BibTeX keys already present when importing BibTeX files with fresh keys generated according to the current template.
- Click **Restore default** to restore the template to `name.year`.
- Click **Remove characters** to define characters that should never appear in a BibTeX key.

12.3.2 Generating a BibTeX File

Citavi offers two ways of generating BibTeX files:

- Manually: You save selected references to a BibTeX file.
- Automatically: Citavi scans a TeX manuscript for BibTeX keys and generates a matching BibTeX file.

Generating a BibTeX Key Manually

1. Select references in your Citavi project.
2. In the **Reference Editor**, on the **File** menu, click **Export**.
3. Select which references to export, and then select **BibTeX** format. Click **Next**.
4. Select the checkboxes for the BibTeX export options you want.
5. Click **Edit BibTex export definition** to change one of the export definitions: you can use the default definition, or you can use one optimized for a particular TeX package (for example, jurabib). You can also select **Customize export definition** to create your own export definition, if necessary.
6. Click **Save file** to set the location for the BibTeX file.
7. Click **Next** and set whether you want to save the settings you just used as an export preset.
8. Click **Next** to save the file.

Generating a BibTeX File Automatically

The prerequisite for generating BibTeX files automatically is that the BibTeX keys in your TeX file must match the ones in the Citavi project. The easiest way to ensure this is to use the Publication Assistant to insert the keys for you. See Using the Publication Assistant with TeX.

1. Make sure **TeX support** is selected under **Tools** > **Options** > **General**.
2. In the **Reference Editor**, on the **Citation** menu, click **Automatic BibTeX export**.
3. Click **Open document** to select the TeX file.
4. Citavi scans the TeX file and shows any errors in the BibTeX keys in it.
5. Choose an existing export definition, or click the **Export definition** link to create a custom export definition.

Creating a Custom Export Definition

In addition to the default, Citavi includes export definitions specifically for various TeX packages, including jurabib and natbib. To create a custom export definition:

1. In the **Reference Editor**, on the **File** menu, click **Export**.
2. Select which references to export, and then select **BibTeX** format.

3. Click **Browse** to set the location for the BibTeX file.
4. Click **Edit BibTex export definition**.
5. Define the reference type mapping and then click **Next**.
6. Define the field mapping. To set a field as "required" in the BibTeX key, click the circle next to it. Then click **Next**.
7. Set the export options for the export definition and then click **Next**.
8. Give the export definition a name and a description for the Quick Help area, and then click **Finish**.

Hint: Sometimes you only need a single reference in BibTeX format, for example to paste it into an online form. You can copy a single reference to the Clipboard in BibTeX format: in the **Reference Editor**, right-click the reference in the preview area and click **Copy formatted reference**. Then click **BibTeX format** and after that click **OK**. The reference is copied to the Clipboard using the BibTeX export definition you last used.

12.3.3 Using the Publication Assistant with TeX

The Publication Assistant works with many common TeX editors:

- LEd
- LyX
- TeXnicCenter
- TeXMaker
- WinEdt
- WinShell
- WinTeX

Configuring Citavi for Your TeX Editor

1. On the **Tools** menu, click **Options**.
2. On the **General** tab, make sure the **TeX support** checkbox is selected.
3. In the Publication Assistant section of the General tab, set your TeX editor as the default word processor.
4. If necessary, change the **Cite** and **Quote** commands and the **New line character** to the ones used by your TeX package.
5. Click the **Browse** to select your LaTeX project folder.

Using the Publication Assistant with TeX

The Publication Assistant is a floating window that shows you a compact view of the contents of your Citavi project while you write your paper. By double-clicking you can directly insert a placeholder for a citation, a complete quotation and its placeholder, or a thought into your document. To use the Publication Assistant with TeX, make sure that the settings under **Tools** > **Options** > **General** > **Publication Assistant** are correct.

If you insert an image quotation from Citavi into the TeX file, an **images** subfolder will automatically be created in the LaTeX project folder. The LaTeX project folder must be defined in the options so that the subfolder will be created correctly. The image file will be named according to the legend.

1. Open the Citavi project.
2. To open the Publication Assistant, on the **Citation** menu, click **Publication Assistant** (or press **F7**). If you want the Publication Assistant to stay on top of other windows, click **Float** in the toolbar.
3. Switch to your TeX editor and place the insertion point where you want to insert the citation, quotation, or thought.
4. In the Publication Assistant, select the reference, quotation, or thought you want to cite or insert.
5. On the toolbar, click **Insert in *[your TeX editor]*** (the name of the button will match your selection in the Options, see above) and click **Insert in *[your TeX editor]* with \cite** (or **Insert in *[your TeX editor]* as footnote with \cite**) to insert the citation, quotation, or thought into the text or footnote, respectively, including the corresponding BibTeX key.
6. When you are finished writing, save the TeX file so that Citavi can scan it for BibTeX keys and create a matching BibTeX file so you can format the final publication.

12.3.4 Inserting Formulas in Quotations

Citavi has a built-in formula editor. The formula editor is text-based so that the formulas you create with it can be inserted into TeX documents.

Creating a Formula

1. Create or open a text quotation or thought.
2. On the **Edit** menu, click **Formula**.
3. Select formula components from the menus, or click **Show formula list** to help you enter the formula.
4. Click **Preview** to check the formula.
5. When you are satisfied with the formula, click **Insert** to place an image of it in the quotation or thought.
6. To edit the formula later, double-click it. If you insert the quotation or thought into a TeX document, the text version of the formula is inserted.

13. Citation Styles

Scholarly publications need to be consistently formatted. Citavi's citation styles help you fulfill this requirement.

In this chapter you will learn:

- How to use citation styles
- How to change citation styles
- How to create citation styles
- How to customize citation keys

13.1 Using Citation Styles

In a publication, the citations in the text, in footnotes, and in the bibliography must be formatted consistently according to a citation style. With Citavi, you don't have to write the citations and bibliography yourself. Just put Citavi placeholders in your manuscript as you write, and Citavi takes care of the rest.

Of course, this demands that the bibliographic information you have added to Citavi is correct. Let's look at an example:

> A book was edited by three authors: Maria Garcia, Susan Miller, and Peter Thomas Smith. In Citavi, you enter the names like this: `Garcia, Maria; Miller, Susan; Smith, Peter Thomas.` (The Quick Help texts for each field tell you how to correctly enter information.)
>
> In your manuscript, when you need to cite the book, you enter its placeholder using the Publication Assistant (you can do it by hand, too). It inserts: `{Garcia 2004 #34}`.
>
> When you've finished writing your manuscript, you use Citavi's **Format publication** feature. Citavi searches the manuscript for the placeholders and replaces them with the correct citations in the selected citation style. For example, a sentence might read `"This line of reasoning is also present in Garcia et al. 2004."`
>
> Finally, Citavi also compiles the citations and adds a bibliography to the end of the document. Again, the selected citation style is used, so the entry in the bibliography might read: `Garcia, M., S. Miller & P.T. Smith(eds.)`.
>
> It's important to always type in the full editor names but to leave out supplementary information such as "editor", since these additions are controlled by the citation style you choose.

Unfortunately, there is no standard format for citations. Each discipline has its own needs and traditions, and departments and institutions often have their own variations. Many publishers and periodicals have "house styles" that you must follow in order for your work to be published.

Citavi has its own citation style, the **Citavi Default Style** which is adequate for work in many disciplines. Citavi also includes hundreds of citation styles, including common styles like APA, MLA, and Chicago as well as the styles of many publishers and periodicals. We are constantly expanding the list of styles, which you can load right from within Citavi. And if you need a different style, you can edit an existing style or create your own.

13.2 Changing the Citation Style

Several citation styles are preinstalled with Citavi, and you can seamlessly download additional styles from our library of hundreds of styles.

Choosing a Citation Style

1. In the **Reference Editor**, on the **Citation** menu, point to **Citation style** and click **Browse citation styles**. This opens the list of styles on your computer.
2. If you want to switch to a style that is in the list, select it and click **OK**.
3. If you need a style that is not on the list, click **Find and add style**. You can search for a style according to a variety of criteria.
    - By **Name**, to search for the exact name of a style guide or of a journal you want to publish in.
    - By **Citation system** to find a citation style that follows a particular pattern.
    - By **Language** to find a citation style in the language you want to publish your article or paper in.
    - By **Subject area** to find a citation style that used in your academic discipline.
4. For each style, a preview is displayed with examples of in-text citations or footnotes and the bibliographic entry for several reference types. After you've found the style you want to use, select the checkbox for the style, and then click **Add**.
5. Click **OK** to finish.

We are happy to add additional citation styles to Citavi, as long as they are the official styles of scholarly journals or academic publishers and documentation is available. Please send your requests to us by e-mail and let us know the Internet address where the citation documentation can be found.

13.3 Creating Citation Styles

Before you begin, read about the Anatomy of a Citation Style to learn about how a citation style is constructed. Then familiarize yourself with the Citation Style Editor. The remaining sections in this chapter cover the specifics of the editor.

To save time, we recommend starting by editing a copy of a citation style similar to what you need.

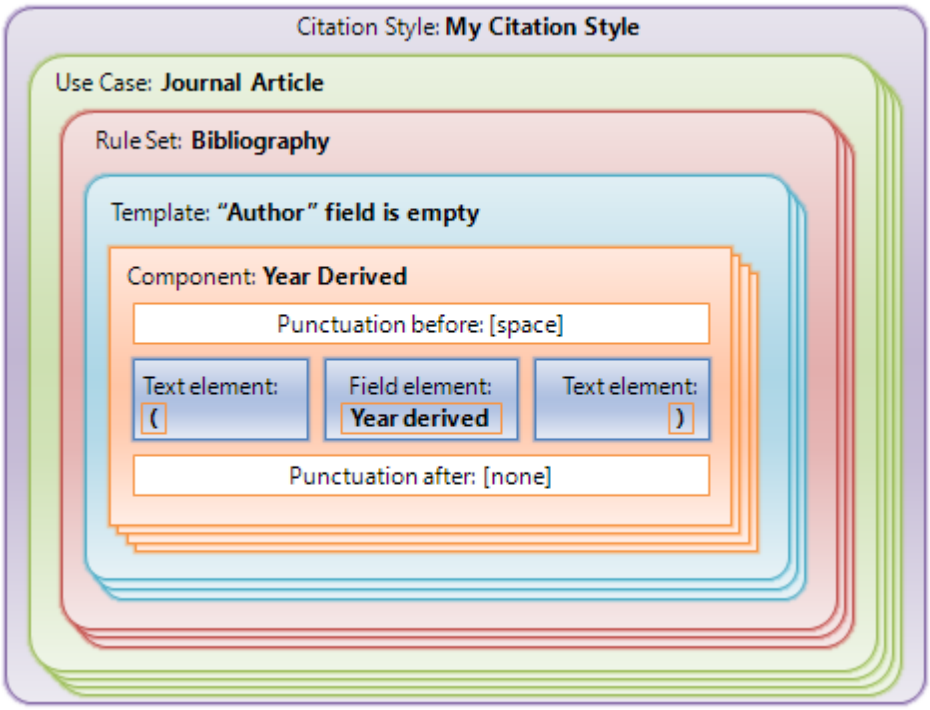
You then use the citation style editor to define the style, covering each use case (book, journal article, etc.) and rule set (in-text or footnote citation, and bibliography entry).

You should also create a test Citavi project with just the reference types that you actually use in your work. Your test project should include several examples of each reference type, with various combinations of completed and empty fields and variations (for example, one, two, or three or more authors, or a missing year).

13.3.1 Anatomy of a Citation Style

Before you begin creating or editing a citation style, it's good to understand how a citation style is constructed.

A citation style is a complete set of rules and formatting covering the entire range of applications of the style. Citavi represents citation styles as a hierarchical nesting of parts.



The highest level inside a style is the **use case**, which is the specific reference type (for example, a book) or combination of reference types (for example, a contribution in an edited book).

Each use case consists of three **rule sets**: in-text citation, footnote citation, and the entry in the bibliography. A rule set can also be inherited from another use case, so you can save time by reusing rule sets.

Within each rule set, there are one or more **templates**, which define the citation or bibliography entry. In many citation styles, citations are formatted differently depending on the citations around them. Templates handle these conditions: one template is the default template, and conditional templates placed before it "catch" special cases.

Within each template, **components** insert content *with its formatting and punctuation*. Components are reusable within a citation style, but it is critical to understand that every instance of a component is identical — if you edit a component in one place, every other instance of it will change as well. If you need the same component in different templates, but with different formatting, you must make a separate component for the alternative formatting.

Within each component, **elements** are the basic building blocks of content: static text and the contents of fields.

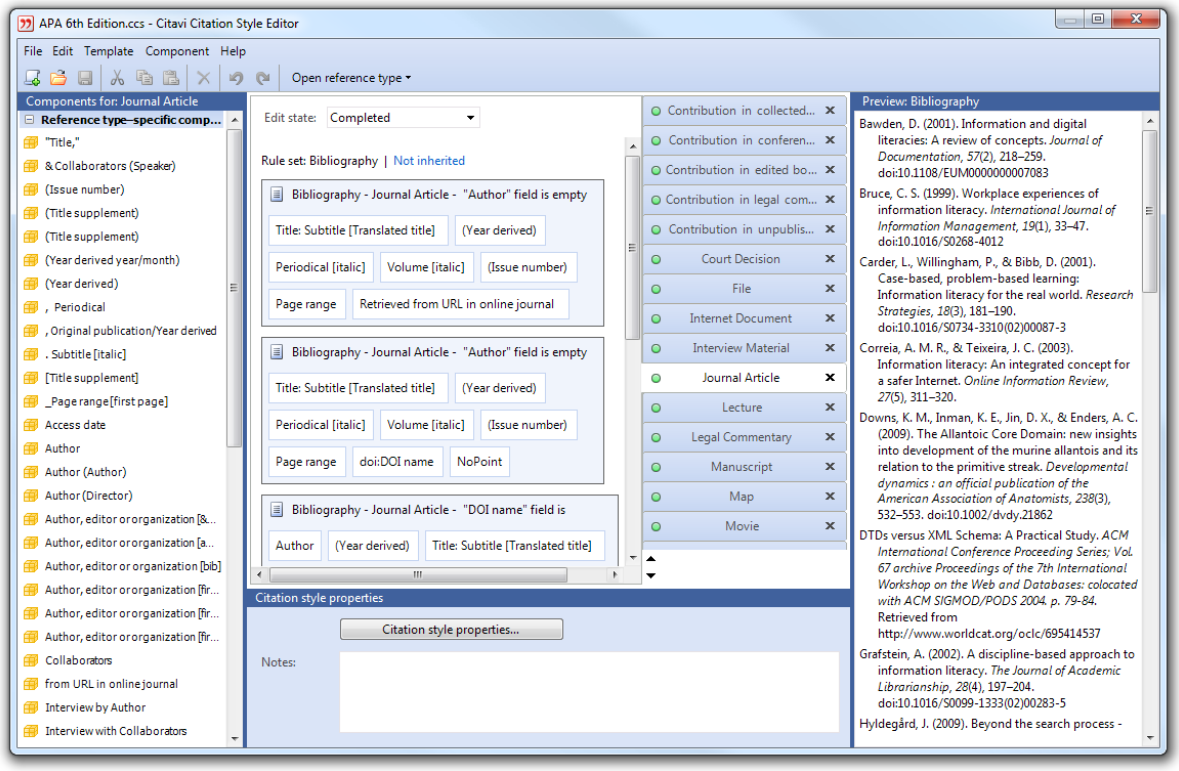
When a citation style is applied to a citation, first the use case is determined, then the appropriate rule set, then the conditions of each template are evaluated (the first one that matches is applied, otherwise the default template is used). Once the correct template is determined, the components pull the contents from the citation and the static text, apply formatting, and output the formatted citation to your publication or bibliography.

13.3.2 The Citation Style Editor

The citation style editor is the tool you use to create a new style by either modifying an existing style or starting a new one from scratch. Before you begin working on a style, be sure you read the preceding chapter, Anatomy of a Citation Style, and read this chapter to learn how the citation style editor is laid out.

The Citation Style Editor Window

Citation styles define the presentation of bibliographic references, or citations, of the different reference types. The components of a citation vary by reference type. In the citation style editor, you see tabs for each **use case** (that is, a reference type or combination of reference types). You will notice that the list of use cases is very similar to the list of reference types (book, journal article, contribution in an edited book, etc.).


APA 6th Edition.ccs - Citavi Citation Style Editor
File Edit Template Component Help
Open reference type
Components for: Journal Article
Reference type–specific comp...
"Title,"
& Collaborators (Speaker)
(Issue number)
(Title supplement)
(Title supplement)
(Year derived year/month)
(Year derived)
, Periodical
, Original publication/Year derived
. Subtitle [italic]
[Title supplement]
_Page range[first page]
Access date
Author
Author (Author)
Author (Director)
Author, editor or organization [&...
Author, editor or organization [a...
Author, editor or organization [bib]
Author, editor or organization [fir...
Author, editor or organization [fir...
Author, editor or organization [fir...
Collaborators
from URL in online journal
Interview by Author
Interview with Collaborators
Edit state: Completed
Rule set: Bibliography | Not inherited
Bibliography - Journal Article - "Author" field is empty
Title: Subtitle [Translated title]
(Year derived)
Periodical [italic]
Volume [italic]
(Issue number)
Page range
Retrieved from URL in online journal
Bibliography - Journal Article - "Author" field is empty
Title: Subtitle [Translated title]
(Year derived)
Periodical [italic]
Volume [italic]
(Issue number)
Page range
doi:DOI name
NoPoint
Bibliography - Journal Article - "DOI name" field is
Author
(Year derived)
Title: Subtitle [Translated title]
Contribution in collected...
Contribution in conferen...
Contribution in edited bo...
Contribution in legal com...
Contribution in unpublis...
Court Decision
File
Internet Document
Interview Material
Journal Article
Lecture
Legal Commentary
Manuscript
Map
Movie
Citation style properties
Citation style properties...
Notes:
Preview: Bibliography
Bawden, D. (2001). Information and digital literacies: A review of concepts. Journal of Documentation, 57(2), 218–259. doi:10.1108/EUM0000000007083
Bruce, C. S. (1999). Workplace experiences of information literacy. International Journal of Information Management, 19(1), 33–47. doi:10.1016/S0268-4012
Carder, L., Willingham, P., & Bibb, D. (2001). Case-based, problem-based learning: Information literacy for the real world. Research Strategies, 18(3), 181–190. doi:10.1016/S0734-3310(02)00087-3
Correia, A. M. R., & Teixeira, J. C. (2003). Information literacy: An integrated concept for a safer Internet. Online Information Review, 27(5), 311–320.
Downs, K. M., Inman, K. E., Jin, D. X., & Enders, A. C. (2009). The Allantoic Core Domain: new insights into development of the murine allantois and its relation to the primitive streak. Developmental dynamics : an official publication of the American Association of Anatomists, 238(3), 532–553. doi:10.1002/dvdy.21862
DTDs versus XML Schema: A Practical Study. ACM International Conference Proceeding Series; Vol. 67 archive Proceedings of the 7th International Workshop on the Web and Databases: colocated with ACM SIGMOD/PODS 2004. p. 79-84. Retrieved from http://www.worldcat.org/oclc/695414537
Grafstein, A. (2002). A discipline-based approach to information literacy. The Journal of Academic Librarianship, 28(4), 197–204. doi:10.1016/S0099-1333(02)00283-5
Hyldegård, J. (2009). Beyond the search process -

The window is divided into three panes. On the left is the list of **Components**. This list is divided into general components and reference type–specific components. In the middle is the main editing pane. Drag components here to add them to templates. Use the tabs in this pane to switch between use cases. On the right is the Preview pane, which shows you the effects of your changes.

Some reference types are cited differently depending on the context: for example, a **contribution in an edited book** is cited differently from a **contribution in a special issue**.

Inside the tab for a use case, you see three **rule sets** where you assemble components into **templates** that apply a particular form of citation in particular situations. This includes the final formatting of the citation.

You should define each of the three rule sets, either by adding one or more templates to a rule set, or by setting the rule set to inherit from another use case.

On the left, you see the list of components. For use cases that are dependent reference types (for example, a contribution in an edited book), the list of components will be divided. The upper part shows the components for the child reference (i.e. "Components for: Contribution", in our example), while the lower part shows the components for the parent reference (i.e. "Components for: Book, edited").

If your citation style requires a component that isn't available, you can create your own component. Refer to Creating Custom Components.

13.3.3 Creating a New Citation Style

To make sure your changes are not overwritten when we update a style, you cannot edit the included citation styles directly: you must make a copy first.

Creating a New Style from Scratch

Hint: We provide templates for many types of styles, which save time compared to starting from scratch. To use them, follow "Editing a Copy of a Style" below, using a copy of one of the Citavi Style Templates.

1. In the Reference Editor, on the **Citation** menu, point to **Citation styles** and then click **Edit citation style**, or press **Shift+F11**.
2. Click **Create citation style**.
3. Start working on the style.
4. Save the citation style file. We recommend the default location, which is the **Custom Citation Styles** folder in your Citavi folder for user files.

Editing a Copy of a Style

1. In the Reference Editor, on the **Citation** menu, point to **Citation styles** and then click **Edit citation style**, or press **Shift+F11**.
2. Select the style you want to edit a copy of. If the style you need isn't in the list yet, click **Find and add style**.
3. Click **Edit**.
4. Enter a name for your style and click **OK**.

When you edit your own style in the future, you can either save a new copy with a new name or open the existing copy directly.

13.3.4 Rules of Thumb

You will find it easier to work with citation styles if you follow a few rules of thumb:

- **A component has identical properties every time it is used.**
  Components are reusable within a citation style, but it is critical to understand that every instance of a component is identical — if you edit a component in one place, every other instance of it will change as well. If you need the same component in different templates, but with different formatting, you must make a separate component for the alternative formatting.

  This means that if you need the same component, formatted identically (for example, the name of a journal in italics), you can define it once and use it in different templates and use cases. Conversely, if you need the same component, formatted differently, you *must* define it a second time for the alternate formatting.

- ***Punctuation before* is more important than *Punctuation after***
  In the citation style editor, you set the punctuation that appears between components. When both **punctuation before** and **punctuation after** are present between two components, **punctuation before** *always* "wins".

  For example, many citation styles use a colon between the author and title. Imagine that you are assembling the citation, starting with the end, layering each component and its punctuation. In this example, put the colon (and a space!) in the **punctuation before** of the title component.

  You can also use this property to your advantage: if you are defining a style where most components are separated with periods, enter periods in the **punctuation after** for every component, and then just define **punctuation before** for the exceptions.

- **Don't use the punctuation fields for parentheses (and the like)**
  Only use the punctuation fields for periods, commas, semicolons, colons, spaces, non-breaking spaces, tabs, and returns. For everything else, create components with text elements instead.

- **Use replacements to clean up**
  Sometimes, the punctuation rules you set up will inadvertently result in unwanted punctuation. Rather than investing too much time trying to solve the puzzle of what is causing the extra punctuation, it can be easier to just define a replacement rule. For instance, suppose a citation ends up ending with a comma, a space, and a closing parenthesis. It is probably faster to just add a custom replacement that searches for "`comma, space, closing parenthesis`" and replaces it with just a closing parenthesis.

- **Reuse rule sets from other use cases**
  In many citation styles, most in-text citations are formatted the same, even for different reference types. Rather than defining the same rule set over and over again, configure the default once, and then just define the exceptions manually.

  To begin, define the default citation style in the **Unknown** use case. In the other use cases, for each rule set that follows the default, click **Not inherited**, point to **Inherit from**, and then click **Unknown**.

  You can share rule sets between similar use cases the same way.

13.3.5 Assembling Rule Sets

As you learned in Anatomy of a Citation Style, a rule set consists of either one or more templates, or it is inherited from another use case. There are three rule sets in each use case: bibliography, in-text citation, and footnote citation.

When you design a rule set, you first design the template that covers the standard citation style, for example a standard entry in the bibliography. With that completed, you can add additional templates that apply in certain conditions.

Defining the Default Template

1. Select the use case you want to edit, for example, **Book**. You can either click the tab for the use case, or you can select it from the **Open reference type** menu. You may find it helpful to complete the **Unknown** use case and base all the other use cases off it, then defining all the exceptions as you go.
2. Begin dragging components from the left into the default template for the rule set you are working on. You will notice that the available components vary by use case. You will often begin with the bibliography rule set, and normally you will add the **Author** component first.
3. Keep dragging in components to assemble the template. You will see your changes in the preview area on the right.

If you need components that aren't available, you can create custom components.

Defining Exceptions

Now that you have handled the default template for a bibliography entry, you will learn how to handle the exceptions.

For example, if an edited book was published by an organization instead of a named editor, you need to cite the organization instead, so you add a new template that applies only when there is no editor.

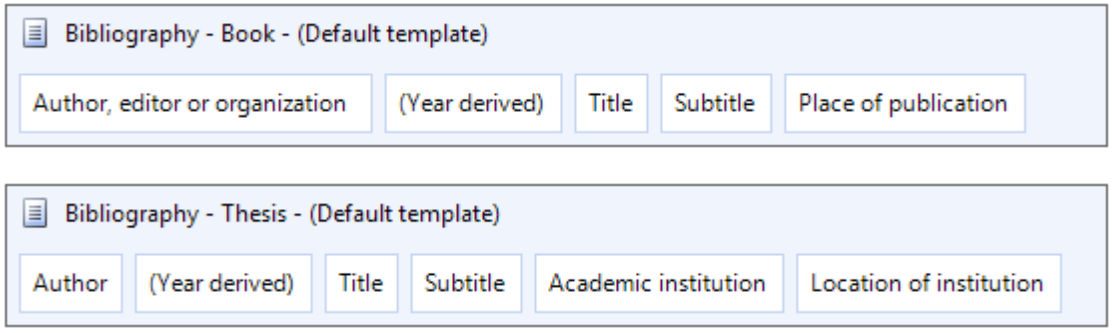
1. With the default template selected, on the **Template** menu, click **New**.
2. Select the checkbox for the condition you are handling. In our example, we select **"Editor" field is empty**.
3. Drag components to the new template.

You need a separate template for each special case you need to handle. To base one template on another, click the template you want to copy, then press **Ctrl+C** to copy it to the Clipboard. Then click the new template and press **Ctrl+V** to paste it. Then you can add or remove components.

13.3.6 Taking Advantage of Similar Use Cases

Many reference types are cited identically or very similarly, so you can save time and reduce errors by reusing rule sets from another use case.

For example, compare the similarities between a book and a thesis:



A thesis isn't published by a publisher and is not released in multiple editions, so that information isn't collected for that reference type. Other information that varies by reference type is stored in the same place internally. For example, the location of the institution for a thesis is stored in the same place as the place of publication of a book. So the components place of publication and location of institution have different names, but both represent the same internal database field. You can take advantage of such fields by inheriting a rule set from another use case.

To inherit a rule set from another use case that is already defined, click the blue link text next to a rule set. Point to **Inherit from** and then click the use case you want to inherit from.

13.3.7 Punctuation

Once you've compiled the components for a template, you need to separate them with the appropriate punctuation.

When defining punctuation, work from the *back*. Suppose your style guide requires:

```
Miller, Sue: New Age. Boston, 2007.
```

Then you should read this as:

- Comma and space before the year
- Period and space before the place of publication
- Colon and space before the title.

Adding Punctuation to a Component

1. Double-click the component you want to punctuate.
2. In the window that opens, click the background of the editing pane to de-select any elements.
3. Enter the **Punctuation before** and **Punctuation after** the component. Since **punctuation before** takes precedence, you will usually enter the punctuation there, for example, a period and a space. Click **OK** to finish.

You should only use the punctuation before and punctuation after boxes for the following punctuation:

- Commas
- Periods
- Semicolons
- Colons
- Spaces
- Non-breaking spaces (Shift+space)
- Tabs
- Returns

To add any other punctuation, such as parentheses, or any other text, create a new component instead.

Important: Use primarily **punctuation before** when possible. **Punctuation before** will always take precedence over **punctuation after**; you will not get both. This behavior helps in situations where a field is sometimes empty, where you might otherwise end up with superfluous or incorrect punctuation marks.

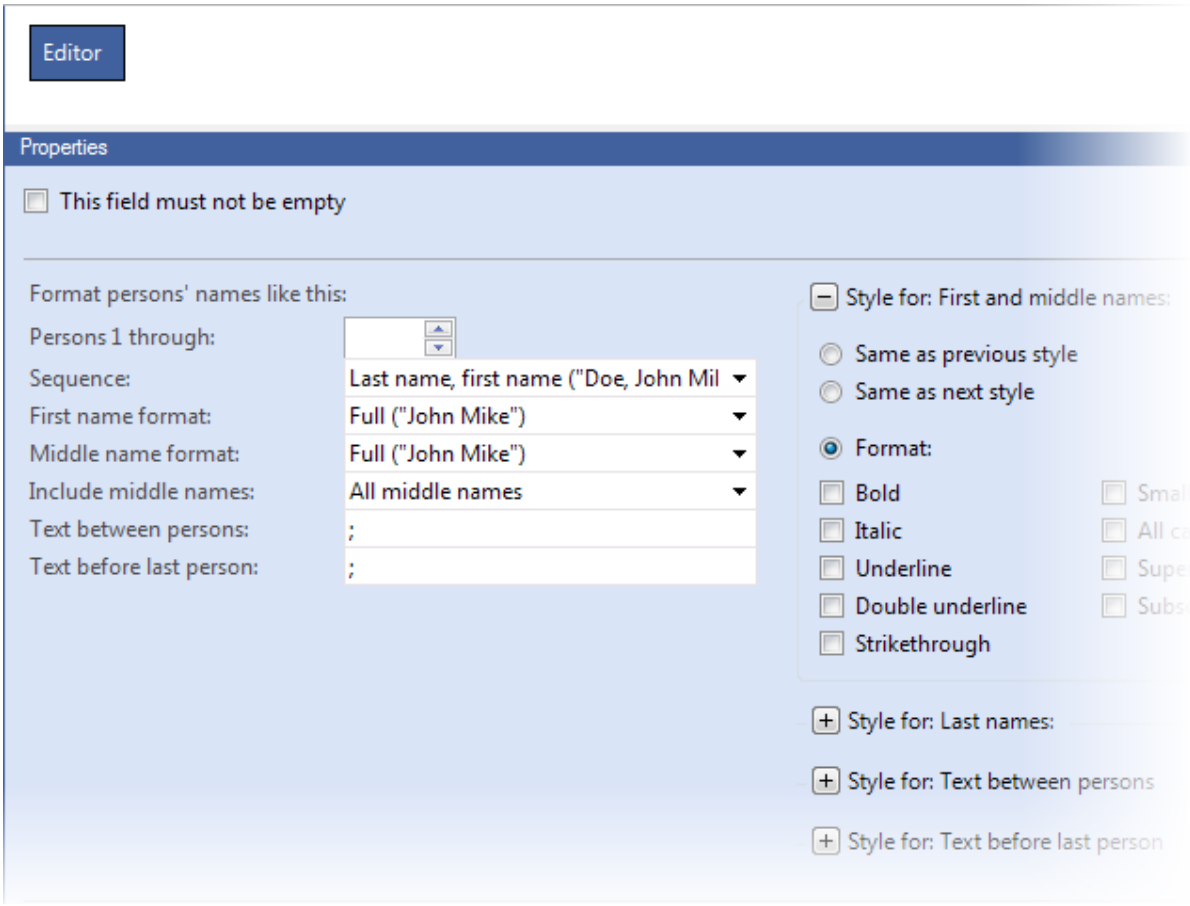
13.3.8 Component Properties

Many components have properties you need to set, for example:

- Abbreviate first names of authors to a single initial.
- For more than 6 authors, list only the first three and append "*et al.*"
- Titles of independent references (e.g. books) appear in italic type, but the titles of dependent references (e. g. contributions in edited books) appear in Roman type.
- Prefix Web addresses with "Available online at: "

Setting Component Properties

1. Double-click the component you want to format.
2. In the component editor window that opens, the upper part of the window is the main editing pane, which shows all the elements inside the component. (Many components have only one element.) The lower half of the window is the properties pane, which shows the options available for the element that is selected in the main editing pane. Different elements have different properties you can edit.



3. Make the desired changes and click **OK** to finish.

13.3.9 Creating a New Component

It is common to need the same component, formatted more than one way. For example, a style may call for the title of a book to be set in italic type, but for the title of a journal article to be set in Roman type. In these situations, you create a new component and configure it as needed.

Duplicating a Component

Often, it makes sense to take an existing component and duplicate it, then make changes to the copy. Then use the copy when you need the alternate formatting.

1. Select the component you want to duplicate.
2. On the **Component** menu, click **Duplicate**.
3. The duplicated component appears in the Components list on the left. "[Copy]" is appended to the name of the component.
4. Double-click the copy and begin editing it.

Creating a New Component

In this example, we'll create a title component in italics, like you might need for books, etc.

1. In the citation style editor, on the **Component** menu, click **New**.
2. In the component editor window that opens, the left column contains two panes: the upper pane contains the **elements** available in the selected reference type, and the lower pane contains the **reference types** to choose from. In this case, we want the **title** element, so we drag it from the list of elements to the main editing pane of the component editor.
3. In the properties pane, open the **Style** group and select the **Italic** checkbox.
4. Click a blank area of the main editing pane.

5. Add any **Punctuation before** (and **Punctuation after**, if necessary).
6. Give the component a **Name**. Here, we could type in `title`, but using a placeholder is more efficient because the placeholder automatically adapts to the correct name in the reference type used. In our example, the "title" in a book is equivalent to the "subject" of archive material, so when you edit a template for archive material, you'll see "subject" instead.
   Since a component can contain more than one element, the placeholders are numbered, starting at zero. Finally, to be able to distinguish the new component, append `[italic]` to its name: `{0} [italic]`.
7. Click **OK** to finish. The new component appears in the list of components, ready to drag into templates.

Creating Components with Text Elements

Sometimes you need to combine components with text, for example to place them in parentheses, to achieve a result like this: (*Series title*, Vol. *Volume*). Take advantage of the ability to combine components and text elements.

1. In the citation style editor, on the **Component** menu, click **New**.
2. In the component editor window that opens, drag the desired elements to the main editing pane.
3. In this example, we'll add parentheses, so drag a **text element** to the main editing pane, dropping it before the existing elements.
4. In the **Text** field, type an opening parenthesis.
5. Repeat the last two steps for the closing parenthesis.
6. To add the "Vol." prefix to the **volume** element, we can either add a text element, or we can edit the properties of the volume element itself. Here, we do the latter and enter "`Vol. `" *with the trailing space* as a prefix.
7. To insert punctuation between elements, add another text element. Here, we add a comma and space and select **Following element contains data**.
8. Click a blank area of the main editing pane and give the component a name. Again, we will use placeholders: `({0}, Vol. {1})`.
9. Click **OK** to finish.

13.3.10 Using Special Components

The citation style editor has several special components

Year Derived

Year derived ensures that a year is always shown, even if the reference type otherwise uses a date. The year is derived by the following rules:

- If the reference type uses a **date** and the date is filled in, **year derived** shows the **date**.
- If the reference type uses a **year** and the year is filled in, **year derived** shows the **year**.
- If the reference type has a **parent reference type that uses a date**, and the date is filled in, **year derived** shows the **date of the parent reference**.
- If the reference type has a **parent reference type that uses a year**, and the date is filled in, **year derived** shows the **year of the parent reference**.

Edition Derived

Edition derived extracts the edition number from an edition such as "2nd improved and expanded edition" and lists only it in the bibliography.

Author, Editor, or Organization

The **Author, editor, or organization** component can be used instead of the individual components, so that the first one that is available is listed. This makes it particularly suited to in-text citations or footnotes, but also means that you cannot combine it with qualifiers such as "Ed.".

Index in Bibliography

The **Index in bibliography** component is used for numbered styles. Add this component to the **In-text citation** rule set and then, in the citation style properties, turn on and configure numbering. When you format the publication, Citavi inserts a number in the text that matches the entry in the bibliography. The bibliography lists references in the order cited.

First Footnote Number

Use the **First footnote number** component to refer back to a reference cited in a previous footnote, for example "Smith (see footnote 14)". To use this component, you must add to the footnote rule set a conditional template, using the **Reference was cited in a previous footnote** condition.

Citation Key

Use the **Citation key** component for styles that use an in-text symbol, such as an authorship trigraph "[Smi09]", or that use an unusual in-text style such as "(Smith, Mycorrhizal symbiosis, 2009)".

To use citation keys, you must turn on **Citation key support** in the Options. That is also where you configure how the citation key is generated.

13.3.11 Names of Persons

Many citation styles have elaborate rules about how names appear:

- Order of first and last names
- Whether first names are spelled out or abbreviated
- Last names in small caps or italics
- Separating multiple names with commas or semicolons
- Whether "and" is inserted in lists of names
- Listing the first person as "last name, first name" and additional persons as "first name last name".
- Showing or hiding name prefixes (such as "von" or "van der") and suffixes (such as Jr.)
- How many authors to list before switching to "*et al.*"
- How editors are marked, for example with "Edited by" or with a suffix such as "(Ed.)"

All these settings are made in the properties of an element for a person field, for example **author** or **editor**.

1. In the citation style editor, double-click a component for a person field, such as author or editor. The component editor opens.
2. If necessary, click the corresponding element (for example, author or editor) to select it. The lower pane of the editor shows the options for names. Go through each group of options to make the appropriate settings:

Option	Purpose
This field must not be empty	Select this option to make sure this information is always completed in the bibliography. If it is missing, Citavi will warn you at multiple points.
Persons 1 through	Some citation styles require the first name, or the first few, to be formatted differently from the rest. If all names are to be formatted identically, leave this blank.
Text before last person	Generally, multiple persons are separated with the same punctuation (a comma or semicolon). In styles where "and" is used before the last person, you can enter it here (with the spaces before and after).
More name options	Use the **Format last person's name differently (if there are at least 2 persons)** option when the last person in the list needs to be formatted differently, for example "Jones, Timothy; Smith, Julia and Anna Miller".

	Use the **Use different separator if number of persons is exactly 2** option for situations where punctuation is different when there are two persons. For example "Jones, Smith, & Miller" but "Smith & Miller".
Name prefixes	You can define how Citavi abbreviates name prefixes, for example for titles of nobility. Enter the full form (e.g. "von"), then a pipe symbol (**Shift+** on a US keyboard, **Alt Gr+`** on a UK keyboard), then the abbreviation (e.g. "v."). Repeat for additional abbreviations, separating full forms and abbreviations with pipes. For example: `von|v.|von der|v. d.`
Name suffixes	You can suppress name suffixes, such as "Sr.", or define the separating punctuation.
Abbreviation	In some subject areas, such as the natural sciences, articles tend to have large numbers of authors. Not all citation styles find this desirable, and specify that only the first few authors be mentioned. When such a rule applies, select the **Abbreviate list** checkbox and then set the number of authors to list, and what text to replace the unlisted authors with (usually "*et al.*") For example, the APA style specifies that for seven authors or more, the first six are listed and "*et al.*" is appended to the list.
Group prefix	Any text to be inserted before a name or group of names can be entered into the Group prefix boxes. For example, a musical work may require "Soloist" in the singular and "Soloists" in the plural.
Group suffix	Any text to be inserted before a name or group of names can be entered into the Group suffix boxes. This is frequently used for lists of editors: "Ed." in the singular and "Eds." in the plural.

Finally, apply any formatting, such as bold or italics, that are necessary for the elements in the component.

13.3.12 Dates

Bibliographic information frequently includes dates and years. You can edit the properties of a date component to customize how dates appear.

For example, the date January 30, 2009 can appear in a citation or bibliography in many ways. For example:

Appearance	Custom format specifier
2009	yyyy
January 2009	MMMM yyyy
2009-01-30	yyyy-MM-dd
1/30/09	MM/dd/yy
Jan 30, 2009	MMM d, yyyy
30.01.2009	dd.MM.yyyy

The full list of custom format specifiers is available from Microsoft: http://msdn.microsoft.com/en-us/library/8kb3ddd4.aspx

There are also standard date formats that are defined by your operating system. These formats change depending on the date format set on your computer system. For example:

Appearance (computer setting)	Standard format specifier
1/16/2009 (en-US) 16.01.2009 (de-DE)	d
Friday, January 16, 2009 (en-US) Freitag, 16. Januar 2009 (de-DE)	D
January 2009 (en-US) Januar 2009 (de-DE)	y

The full list of standard format specifiers is available from Microsoft: http://msdn.microsoft.com/en-us/library/az4se3k1.aspx

Occasionally, you may add a reference that has not been published yet. In these cases, right-click a date or year field and click **In press** to insert a placeholder.

In the citation style editor, you can set the text that the placeholder is replaced with, such as "in press" or "forthcoming"

In some use cases, instead of a **year** component, you will see a **year derived** component instead. See Using Special Components.

13.3.13 Numbers

Bibliographies use numbers in the following places: edition, volume, issue, and page numbers.

Using the example of the edition, we'll show how you edit the appearance of numbers in a component. For this example, we assume an English citation style which requires a space and the word "edition" after the edition number, using ordinal numbers (1st, 2nd, 3rd, 4th, etc.). In the citation style editor, double-click the Edition component to edit its properties.

To configure ordinals, select the **Use ordinals** checkbox and enter the suffixes for ordinal numbers. Use the **Regular ordinals** box to set the standard form (in English, this is "th", as in "4th"). Use the **Irregular ordinals** box to set the irregular ordinals (in English, "1st", "2nd", "3rd"). Pair each irregular number with its suffix, using the pipe symbol (**Shift+** on a US keyboard, **Alt Gr+`** on a UK keyboard) as the separator: `1|st|2|nd|3|rd`

The edition field also has an **edition derived** component. **Edition derived** extracts the edition number from an edition such as "2nd improved and expanded edition" and lists only it in the bibliography.

13.3.14 Page Numbers

In many reference types, you must include the page numbers of the work, for example journal articles, newspaper articles, and contributions in edited books. Citation styles format page numbers in myriad ways. Here are a few examples:

357–389

357–89

357–

357ff.

P. 357–389

pp. 357–389

(P. 357–389)

Citavi helps you format page numbers exactly how the citation style requires. In the citation style editor, double click the **Page range** or **Quotation page range** component to edit the formatting options for page numbers, margin numbers, columns, paragraphs, etc.

13.3.15 Names of Periodicals and Series

In some subject areas, it is customary to not list periodicals and series by their full names, but rather by their abbreviations. Citavi lets you add up to three abbreviations to each periodical or series. To add abbreviations, in the **Reference Editor**, on the **Lists** menu, click **Periodicals** or **Series**, respectively. Then double-click a periodical or series and add the abbreviations.

To use the abbreviation in the bibliography instead of the full name, use the citation style editor to change the style.

1. Open the citation style in the citation style editor.
2. Switch to the **Journal article** use case (for periodicals) or the **Book** use case (for series).
3. In the list of components, double-click the **Periodical** component (for periodicals) or **Series title** component (for series). This opens the component editor.
4. In the **Properties** pane of the component editor, under **Use name or abbreviation**, select the name or abbreviation you want to use. The **Fall back to next available name** option lets Citavi use the next name or abbreviation it finds, if the selected name or abbreviation is empty.

5. Click **OK** to finish and then save changes to the citation style.

13.3.16 Setting the Edit State

Citavi lets you set the edit state of a use case to help you keep track of your progress when creating a citation style. The edit state has a name and a color, so you can quickly scan the menu of use cases to find the ones that need work.

The edit states are:

None (transparent): No edit state is set for the use case.

Not needed (white): The use case isn't applicable to the style.

Under construction (red): The use case is not finished.

Needs review (yellow): The use case is basically finished, but needs testing.

Completed (green): The use case is tested and ready for use.

Setting the Edit State

1. Open the citation style editor.
2. Click the dot on the tab for a use case to cycle through the different edit states. You can also use the **Edit state** menu inside the tab of a use case.

13.3.17 Citation Style Properties

The settings you've made so far define the specifics of formatting a single citation. The citation style properties let you control the overall appearance of the bibliography.

Properties you can set include:

- The sort order and paragraph formatting of the bibliography
- How ambiguous citations are differentiated
- Formatting of multiple citations (citations of multiple sources)

- Replacement rules for strings of characters
- A descriptive Quick Help text
- The classification of the style by language, layout, and subject area

Editing Citation Style Properties

1. Open the citation style in the citation style editor.
2. On the **File** menu, click **Citation style properties**.
3. Make any changes, then click **OK** to finish. Be sure to save the citation style afterwards.

Classifying Citation Styles

If you work with, or create, a lot of citation styles, it can be handy to classify them with additional information.

The **Quick Help text** Tab

This tab lets you enter a descriptive Quick Help text that appears in the citation style selection window. Describe the distinctive features of the style, for example "`This style includes the ISBN numbers of books in the bibliography.`"

The **Classification** Tab

To help you find the style quickly, you can set characteristics about the style.

- **Language (Culture)**
  Because many citation styles include language-specific text, such as "ed.", "in press", or "n.p.", you can set the language of the style.
- **Citation system**
  This characteristic describes the basic system used by the style.
- **Subject areas**
  Select the subject areas the style is commonly used it. You can also use broader terms, such as "social sciences" or select none at all.

Laying Out the Bibliography

The **Bibliography** Tab

This tab contains basic settings of the bibliography.

- **Create bibliography**
  Sets whether a bibliography is created. Styles that put complete citations in footnotes generally do not have a bibliography.
- **Final character**
  Sets the ending punctuation at the end of each entry in the bibliography.
- **Automatically include parent references in the bibliography**
  Sets whether a parent reference (for example, the edited book containing a passage you cited from a contribution) appears in the bibliography when you cite a child reference.
- **Hanging indent**
  Sets a hanging indent for each entry in the bibliography.
- **Space after**
  Sets the amount of white space after each entry.
- **Bullets and numbering**
  Set whether to use place a bullet or number before each entry. When **Numbering** is selected, you can click

Customize to configure the numbering system.

- **Sorting**
  Set the order of the entries in the bibliography. When **Custom** is selected, you can click **Customize** to configure the sort order.

- **Insert heading before bibliography**
  Set a header to introduce the bibliography, if the style calls for one.

The **Ambiguous citations** Tab

This tab is where you set how ambiguous citations (that is, citations that might otherwise be identical) are differentiated. Common names such as Johnson, Smith, or Chang who publish multiple works in a year can lead to ambiguity. Citation styles handle this a few different ways.

- **Append a unique letter**
  If the same author publishes more than once in a year, you can disambiguate by appending a letter to the year, citation key, or both (the **Auto** setting is usually fine):
  Johnson (2009a)
  Johnson (2009b)

- **Add authors or editors until the citation is unique**
  If the citation style generally requires that only the first author of a work be cited, another way to disambiguate is to include co-authors or editors:
  Johnson (2009)
  Johnson, Chang (2009)

- **Add first names or initials of authors or editors**
  In a citation style that generally lists only the last name, one way to disambiguate is to include the first name:
  Johnson, Anne (2009)
  Johnson, Martin (2009)

The **Multiple citations** Tab

Sometimes, you may provide multiple sources for a single statement, for example: "This leads to a reduced nitrogen saturation (cf. Johnson 2009, Smith 2000, Cheng 2003)." These options are set separately for in-text and footnote citations.

- **Separate multiple citations with**
  Enter the punctuation entered between sources in a multiple citation, for example a comma or semicolon and a space.

- **Consecutive citations by same author**
  In some styles, multiple references from the same author are separated with different punctuation than references from different authors, for example a comma: "Smith 2000; Chang 2003; Johnson 2004, Johnson 2009". Some styles also suppress the author name for consecutive citations: "Smith 2000; Chang 2003; Johnson 2004, 2009".

- **Apply conditions for consecutive citations to multiple citations**
  Template conditions let you configure a style to format consecutive citations differently, for example using "ibid." This option lets you apply the same conditions to multiple citations, for example:
  "Smith 2000, pp. 11–14; Johnson 2004 p. 34; *ibid.* p. 56".

- **Sorting**
  You can set whether the references cited are listed **in the order cited** ("Smith 2000, Johnson 2009, Johnson 2004"), **by author, year, and title** ("Johnson 2004, Johnson 2009, Smith 2000"), or **in the order in the bibliography**. You can also set a custom sort order if necessary.

- **Reference number options**
  For citation styles that use reference numbers (where only a number is shown in the text, referring to a numbered entry in the bibliography), this button opens additional options: you can group numbers to allow for more compact citation, e.g. [5–8] instead of [5; 6; 7; 8].

Some citation styles group multiple references to a single reference number if those references don't appear anywhere else: select the **Group references which are cited only within a multiple citation to a single citation** checkbox to do this.

The **Replacements** Tab

It is not unusual for there to be excess punctuation in a citation, for example if a style calls for a period between the title and subtitle, but the title already ends in punctuation. This tab lets you configure replacements to clean up excess punctuation. Some of the most common replacements are set by default.
You can also use replacements for any character substitutions you want. For example, if you are publishing in German in Switzerland, where the **ß** character is not used, you could define that ß is replaced with `ss` in the bibliography.

- **Common replacements**
  There are eight checkboxes for the most common punctuation cleanup.
- **More**
  This option lets you add any additional replacements you want.
- **Capitalize the first letter automatically**
  If necessary, you can set Citavi to automatically capitalize the first letter of an entry in the bibliography **At the beginning of every footnote**; **At the beginning of every footnote, for static text only**; or **At the beginning of every sentence**.

13.4 Customizing Citation Keys

Some citation styles are particularly demanding.

In one example, the style calls for an in-text citation key comprised of:

1. The first three letters of the author's last name if there is one author, the first two letters of the authors' last names if there are two authors, or the first letter of the first three authors' last names if there are three or more authors.
2. The year.

You need to cite Smith 2000, Jackson and White 2002, and Burroughs, Kim, and Gonzales 2010, producing `[Smi2000]`, `[JaWh2002]`, and `[BKG2010]`, respectively.

In another example, the style requires a full citation on the first citation, but only the first two words of the title on subsequent citation:

First citation: Strong, D. M., Y. W. Lee, and R. Y. Wang. 1997. 10 Potholes in the Road to Information Quality. *Computer IEEE* 30, no. 8:38–41.
Subsequent citation: Strong, 10 Potholes, 41–44.

For these styles, the notes in Citavi about the citation style will specify that you need to turn on **Citation key support** and tells you how to configure the citation key template.

When creating your own styles, citation keys can be a powerful tool to implement unusual requirements. The citation key is available as a component in the citation style editor and can thus be combined with any other components. In the first example, the entire in-text key could be simply the citation key. In the second example, only the first two words of the title would be in the citation key, which would then be combined with the **Author** and **Quotation page range** components to create the in-text citation.

Generating Citation Keys

1. On the **Tools** menu, click **Options**. Then, on the **General** tab, select the **Citation key support** checkbox.

2. Citavi will offer to generate citation keys for each reference. You can edit an automatically-generated citation key at any time.

Customizing Citation Key Templates

1. On the **Tools** menu, click **Options**. On the **General** tab, click **Customize** next to the selected **Citation key support** checkbox.
2. To change the default template for all reference types, click **Default**.
3. Make the changes you want. You can change what fields are used to build the key, how they are formatted, the punctuation used, and conditional exceptions.
4. If you need certain reference types to have special citation keys, you can define additional templates for each of them. Click **Add template for reference type** and then configure the template.
5. When you are finished making changes, click **OK**. Citavi asks what you want to do with existing citation keys.

Exporting Citation Key Templates

You can save a citation key template as a file share with others or to make it easy to move to another computer.

1. On the **Tools** menu, click **Options**. On the **General** tab, click **Customize** next to the selected **Citation key support** checkbox.
2. Customize the citation key template.
3. Click **Export** and save the citation key template (.ckd) file.

Importing Citation Key Templates

If you have a citation key template file, you can import it so you don't have to manually configure the template.

1. On the **Tools** menu, click **Options**. On the **General** tab, click **Customize** next to the selected **Citation key support** checkbox.
2. Click **Import** and select the citation key template (.ckd) file.
3. Citavi asks what you want to do with existing citation keys.

14. Collaborating in a Team

The workgroup features in Citavi Team let multiple users work on a project at the same time.

This chapter covers:

- What you need to work with Citavi Team
- How to create a new team project or convert an existing project
- How to protect a team project
- How to add and remove team members
- How to assign specific roles to team members
- How to change passwords on protected projects
- Making sure you have the latest changes to an open project

14.1 Overview of Citavi Team

To use Citavi Team, all the team members must be able to access a network share (or other shared drive) where the shared projects are saved.

Which team features are available to you depends on two things:

1. **License:** Different licenses impose different restrictions on which projects you can read and modify.
2. **Protection:** Team projects can be protected and access defined by roles assigned to the members of the team.

In a given project, you cannot exceed the restrictions imposed by your license and your role in the project.

License Comparison

	Small Projects Up to 100 references		**Large Projects** More than 100 references	
License	**Solo**	**Team**	**Solo**	**Team**
Citavi Team	Modify	Modify	Modify	Modify
Citavi Pro	Modify	Modify	Modify	Read-only
Citavi Reader	Modify	Modify	Read-only	Read-only
Citavi Free	Modify	Modify	Read-only	No access

Citavi Team is intended for users who need to read and modify team projects of any size and solo projects of any size.

Citavi Pro is intended for users who need to read and modify solo projects of any size, read and modify small team projects, and read team projects of any size.

Citavi Reader is intended for users who only need to read, but not modify, team projects.

Citavi Free is intended for users who need to work only on small projects, or to test Citavi before buying a license.

14.2 Setting Up a Team Project

You can start a new team project, or you can convert an existing solo project to a team project. Note that converting always creates a new copy of the project, it does not convert the existing project directly.

Creating a New Team Project

1. In the **Reference Editor**, on the **File** menu, click **New project**.
2. Click **Team project**.
3. Choose where you want to save the project. This must be a folder that all team members can access.
4. If you want to protect the project, click **Protect with login** and enter your e-mail address and a password. You can also set up other team members to grant access to specific persons.
   If you want anyone to be able to open the project, click **Don't protect**.

Converting an Existing Solo Project

Converting always creates a new copy of the project, it does not convert the existing project directly.

1. Open the solo project.
2. On the **File** menu, click **Save a copy as team project**.
3. Choose where you want to save the project. This must be a folder that all team members can access.
   Important: This must not be the folder the solo project is in.
4. If you want to protect the project, click **Protect with login** and enter your e-mail address and a password. You can also set up other team members to grant access to specific persons.
   If you want anyone to be able to open the project, click **Don't protect**.

Converting a Team Project to a Solo Project

You can convert to a solo project if you no longer need to collaborate, for example if you leave a team and now have sole responsibility over the project. Converting always creates a new copy of the project, it does not convert the existing project directly.

1. Open the team project.
2. On the **File** menu, click **Save a copy as solo project**.
3. Choose where you want to save the project.

14.3 Protecting a Team Project

You have the choice of protecting a project or leaving it unprotected:

- **Unprotected projects** can be opened by any Citavi user that has an appropriate license.
- **Protected projects** can only be opened by Citavi users who have appropriate licenses and have been added as team members of the project. Depending on the roles assigned to them, they may or may not be able to make changes to the project.

You can protect a project when you create it, or you can protect it later. When you protect a project, you automatically become a Project leader for the project.

Sometimes it may not be necessary to protect the project from within Citavi:

- If you work in a small group where you trust everyone, no protection may be necessary at all. That saves you administrative effort.
- If you have a system administrator who can help (or if you are knowledgeable yourself), you can use Windows file permissions to protect sensitive information.
- For large projects (more than 100 references), you can also restrict who can do what by giving users licenses that do not allow them to modify large projects. See the license comparison.

Protecting an Existing Team Project

1. Open the unprotected team project.
2. On the **File** menu, click **Project properties**.
3. Click the **Team setup** tab.
4. Make sure no other team members are using the project, or else they may lose any unsaved changes they have made.
5. Click **Protect with login** and enter your e-mail address and a password. You can also set up other team members to grant access to specific persons.

Important: All backups of the team project that were created *before* the project was protected are **not protected** and can be opened by anyone with access to the backups. If the backups contain sensitive information, move them to a location that unauthorized users cannot access.

Unprotecting a Project

To unprotect a team project, you must be a project leader of it.

1. Open the protected project you want to unprotect. Log in if necessary.
2. On the **File** menu, click **Project properties**.
3. Click the **Team setup** tab.
4. Make sure no other team members are using the project, or else they may lose any unsaved changes they have made.
5. Click **Unprotect team project**. All members will be removed from the project.

14.4 Managing Team Members

In protected team projects, you can add and remove members as needed. You must be a project leader of the project to manage its members.

Adding a New Team Member

1. Open the protected project. Log in if necessary.
2. On the **File** menu, click **Project properties**.
3. Click the **Team members** tab.
4. In the empty line at the end of the list of members, type the new member's e-mail address. Citavi automatically generates a random password, but you can replace it with any password you want. (The team member can change the password later.) Repeat for each new member you want to add.
5. Assign a role to each member.
6. If you want to notify the members that they have been added to the team project, select the **Notify members by e-mail** checkbox. When you click **OK**, Citavi composes a message in your default e-mail program, which you can verify and edit before sending.

Importing Team Members from Another Team Project

If you already have another project with members you want to add, you can import the members rather than adding them each by hand.

1. Open the protected project you want to import members to. Log in if necessary.
2. On the **File** menu, click **Project properties**.
3. Click the **Team members** tab.
4. **Right-click** anywhere in the list of members and then click **Import from existing project**.
5. Choose the team project containing the members you want to import. Citavi automatically generates a random password for each user, but you can replace them with any passwords you want. (The team member can change the password later.)

6. Assign a role to each member.
7. If you want to notify the members that they have been added to the team project, select the **Notify members by e-mail** checkbox. When you click **OK**, Citavi composes a message in your default e-mail program, which you can verify and edit before sending.

Removing a Team Member

1. Open the protected project you want to import members to. Log in if necessary.
2. On the **File** menu, click **Project properties**.
3. Click the **Team members** tab.
4. **Right-click** each member you want to remove and then click **Remove**.
5. If you want to notify the members that they have been removed from the team project, select the **Notify members by e-mail** checkbox. When you click **OK**, Citavi composes a message in your default e-mail program, which you can verify and edit before sending.

14.5 Assigning Roles

Citavi Team lets you assign one of three different roles to each team member in a protected project. What you can do in a project is the combination of your role and of the features your license allows you to use.

- **Project leaders** can read, make changes to, and manage team members in a project.
- **Authors** can read and make changes to a project.
- **Readers** can read a project, but cannot make changes to it.

Role	What You Can Do		
	Read	Modify	Manage Team Members
Project leader	•	•	•
Author	•	•	
Reader	•		

Changing a Member's Role

1. Open the protected project. Log in if necessary.
2. On the **File** menu, click **Project properties**.
3. Click the **Team members** tab.
4. Click the **Role** for the member and then click the role you want to assign.
5. If you want to notify the members whose roles have changed, select the **Notify members by e-mail** checkbox. When you click **OK**, Citavi composes a message in your default e-mail program, which you can verify and edit before sending.

Resigning as Project Leader

1. Follow the instructions above to assign the **Project leader** role to one or more other team members.
2. Close the project.
3. Ask one of the new project leaders to change your role to **Author** or **Reader**.

14.6 Changing Passwords

Changing Your Own Password

You can change your own password at any time.

1. Open the protected project. Log in if necessary.
2. On the **File** menu, click **Project properties**.
3. On the **Team setup** tab, click **Change password**.
4. Enter your new password.

Changing Another Team Member's Password

If you are a project leader of a team project, you can reset another member's password for them if they forget it. You cannot read the existing password, you can only reset it.

1. Open the protected project. Log in if necessary.
2. On the **File** menu, click **Project properties**.
3. Click the **Team members** tab.
4. Enter the new password in the **Password** column for the member in question.

14.7 Refreshing Changes

When multiple users have a project open at the same time, Citavi automatically refreshes changes made by other users any time you:

- Switch to a different workspace
- Switch to another reference
- Switch to a different tab
- Close and save an editor window (e.g. for a quotation or abstract)

This also means that if you don't do any of the above, you won't see changes made by other users. To force Citavi to refresh changes made by others, press **Alt+F5**, or on the **File** menu, click **Refresh changes made by other users**.

15. Customizing Citavi

This chapter shows you how to tailor Citavi to meet your needs:

- Program Options
- Color Coding Projects
- Customizing the Overview Tab
- Customizing the Reference Tab
- Using Custom Fields
- Customizing Quick Help
- Adding Spell Check Dictionaries
- Using Settings Files

15.1 Program Options

On the Tools menu, click Options for settings you can use to customize Citavi to meet your needs.

15.1.1 General

User Name and Initials

Citavi uses your name and initials exclusively for logging changes to projects, and for printing various lists. This helps you organize your work and is useful if you work in a team or share bibliographic information with others. The **User name** is used to identify the initials used throughout Citavi. Citavi automatically generates **Initials** from the first and last name of the user name. If you work in a team, make sure the initials are unique.

Open last project when Citavi starts (skip welcome screen)

Select this option to automatically reopen the last project you worked on when you start Citavi. The welcome screen is skipped.

Generate core statements automatically

Select this option to automatically use the first few words of a new quotation as the core statement.

TeX Support

Select this option if you are using TeX and want to insert BibTeX keys and quotations into TeX documents using the Publication Assistant. After you have selected this option, click **Customize** to edit the template Citavi uses to generate BibTeX keys. For more information, see Creating a Publication with TeX.

Citation Key Support

Select this option to use citation keys in your publications. Citation keys are used in certain disciplines, such as chemistry or computer science. For example, the citation key "Kor06" might refer to the reference "Kornberg 2006". When you have selected this option, click **Customize** to change the template Citavi uses to generate citation keys.
In certain disciplines, significant words from the title are used to cite a reference. For example, "Churchill, World War" might refer to Churchill's book "The Second World War". As a result, many citation keys cannot be generated automatically. If necessary, change the citation key manually. See also Adding a New Reference.

Important: Citavi does not differentiate ambiguous citations in the citation key (for example, Smith 2000a, Smith 2000b). The citations are differentiated according to the citation style when the bibliography is created.

Publication Assistant: Default Word Processor

Select the word processing program that you want to use with Citavi. The Publication Assistant inserts references, quotations and thoughts directly into the active document in the selected program.

Publication Assistant: Double-Click Reference** and **Double-Click Knowledge Item

Select what the Publication Assistant does when you double click a reference or knowledge item. You can choose among:

- **Copy**
- **Copy or insert with options**
- **Insert in Microsoft Word** (or other selected default word processor)
- **Insert in Microsoft Word as footnote** (or in other selected default word processor)
- **Show reference** or **Edit knowledge item**

Publication Assistant: Insert Sequence Number

When formatting a publication, Citavi searches a document for placeholders (text in braces). If there is a sequence number within the braces (for example, #134) Citavi can positively identify the reference. If there is no sequence number, Citavi will attempt to identify the reference by author and year. This option should usually be turned on. You should turn off this option if you are working with multiple Citavi projects where the same references likely have different sequence numbers.

When Using TeX Support: Cite Command

The \cite command is used by LaTeX to insert a BibTeX citation:

```
\cite{Muller07:Introduction}
```

If necessary, you can enter multiple commands here for quick access in the Publication Assistant. For example, for the natbib package, enter:

```
\citet; \citep; \citealt
```

When Using TeX Support: Quote Command

The "quote" command is used by LaTeX to insert a quotation. Replace "quote" with "quotation" to indent the first line of the quotation. If the quotation is a poem, replace "quote" with "verse" to preserve line breaks.

If necessary, you can enter multiple commands here for quick access in the Publication Assistant. Separate the commands with semicolons.

```
quote; quotation; verse
```

When Using TeX Support: Line break command

Configure how Citavi encodes line breaks when exporting TeX (for example, in longer quotations).

Common commands are `\newline` and `\par`

When Using TeX Support: LaTeX Project Folder

Select the folder where your LaTeX editor saves LaTeX projects. When you insert an image quotation from Citavi into your LaTeX editor, Citavi copies the image file to this folder.

When Using TeX Support: Use LaTeX Notation for Quotations

You can insert references and quotations directly into a TeX document or copy them to the Clipboard.

Select this option to export special characters (such as letters with umlauts or accent marks) using LaTeX notation.

For example, an ä will be exported as `{\"a}`.

Reset Warnings

Some Citavi warnings include an option to not show the warning again. Click **Reset warnings** to display all warnings again.

15.1.2 Folders

File Locations: User Files

To change where Citavi saves your user files, click the button to select the folder. You must restart Citavi for this change to take effect.

File Locations: Enable Offline Copies of Non-Local Projects (Caching)

Citavi saves local copies of projects when two conditions are met: 1) the project is on a network share, and 2) Citavi is started locally, not from an application server or terminal server.

Clear this checkbox to disable caching.

Backups: Backups

Citavi can automatically create backups of your projects. After working on a project, it will be copied to a ZIP archive and saved in the folder that you choose. This option lets you set whether Citavi backs up your project automatically or only with confirmation. You can also set Citavi to make no backups (not recommended).

Backups: Folder

Click the browse button to select the folder where Citavi saves your backups.

Backups: Number of Versions

Citavi can save multiple backups of a project. You can identify each backup from the date and time saved in the file name. You can select the number of backups Citavi saves for you (we recommend at least 3).

Paths: Use Relative Paths

In a computer file system, a path shows the complete route to a file or folder. By default, Citavi uses *absolute paths*, which specify the absolute location of a file, independent of other files. For example, if you link a PDF file to a reference, the Location field of a local file might show a path like this:
"`C:\Users\Me\Documents\Projects\Thesis\Documents\ALA_Standards.pdf`".
However, on your office computer, the path might be different, for example:
"`V:\Team\Johnson\Thesis\Documents\ALA_Standards.pdf`"
If you work on two computers, this can lead to problems because files may not be found.
Alternatively, you can choose to use *relative paths*, which show the location of a file *relative to your project file.*
Turn on the **Use relative paths** option in Citavi on both computers, and keep linked files together with the project folder. A good practice is to create a folder for attachments in the same folder as the Citavi project. Then, any time you copy or move the project, just copy or move the attachments folder with it.
If you have been using absolute paths and then change to relative paths, existing references **will not** change automatically.

Paths: Convert Paths

Click **Convert paths** to change existing absolute paths to relative paths.

Paths: Repair Paths

If you need to fix the paths of linked files in your project (for example, if you move your project from "C:\" to "D:\"), click **Repair paths**.

Clear Recent Items

Citavi remembers projects and documents you used recently. Click here to clear the list of recent items. After the list has been cleared, the welcome screen will only show projects in the **User files** folder.

15.1.3 Search

Online Search and Import: Include Keywords

Select this option to include keywords from searches or imported files by default. When you add references to a project, you are always given the option to include or omit keywords.

Online Search and Import: Include Locations

Select this option to include locations from searches or imported files by default. When you add references to a project, you are always given the option to include or omit locations.

Online Search and Import: Enable Direct Import

This feature makes it easier to import text files containing search results from websites. When this option is selected, you can import search results directly to a Citavi project when you double-click a compatible file. This feature works with the following file types: RIS (.ris), BibTeX (.bib) and EndNote (.enw). If you use Citavi alongside other reference management programs, you may want to turn off this feature so that a different program opens the files when you double-click them.

Online Search and Import: Edit Credentials for Subscription Databases

For Citavi Pro and Citavi Team users, Citavi can remember the login credentials for subscription databases. To change these credentials, select the database, then click **Change**. To delete them, click **Remove**.

ISBN Download

This ISBN download feature lets you download the bibliographic information of books from a bookseller or library catalog by simply entering the ISBN numbers of the books. Click **Add database or catalog** to choose the catalogs Citavi uses for ISBN searches and then use the arrows to set the order they are searched in, with the highest-priority database or catalog first in the list. You should put the library you normally borrow books from at the top of the list.

Note: Some catalogs you use for online searches may not be available because they do not support this feature.

ISBN Download: Include Locations

Select this option to include the location (call number) of books in libraries whose catalogs are selected for ISBN downloads.

ISBN Download: Include Keywords

Select this option to include the keywords applied to books by libraries whose catalogs are selected for ISBN downloads.

ISBN Download: Include Cover Art

Select this option to include cover art when performing an ISBN download. When available, cover art is downloaded from Amazon and the German bookseller Lehmanns Fachbuchhandlung.

Location Search

You can use the **Find library locations** feature on the **Tasks & locations** tab to find whether a book in your project is available at your local library. Select catalogs of libraries you can borrow from.

Click **Add database or catalog** to select the catalogs to search. Use the arrows to move your preferred library to the top of the list.

Proxy Settings

A proxy is an intermediary server used to control, monitor, or permit access to network resources over the Internet.

If you encounter difficulties with the online search feature, a proxy is often the problem. Check with your system administrator or library to make sure you are using the correct proxy settings.

Proxy Settings: Do Not Use a Proxy

Select this option if your computer connects to the Internet directly (without a proxy server).

Proxy Settings: Use Windows Proxy Settings

Select this option if your computer connects to the Internet through a proxy server configured in the Windows Control Panel: **Start > Control Panel > Internet Options > Connections > LAN Settings > Proxy Server**.

Proxy Settings: Use This Proxy

Select this option if your computer connects to the Internet through a proxy server which is not configured in the Windows Control Panel.

Proxy Settings: Compatibility Mode for HTTP 1.0 Proxies

Select this option if you connect to the Internet with a proxy server that uses HTTP 1.0. If necessary, ask your network administrator.

15.1.4 OpenURL

Refer to Checking Availability Using OpenURL.

15.1.5 Ordering

Online Booksellers

Citavi can help you order books online. Click **Online booksellers** to choose the booksellers you want to use, and to set the preferred search order.

Bookseller Order by E-mail

If you have a preferred bookseller, you can enter its e-mail address here. With it, Citavi can automatically compose an e-mail message to the seller. To place an order, on the **Tasks & locations** tab, click **Order** > **Book by e-mail**.

Other Ordering by E-mail

If you have access to a service provider that can make copies of journal articles, books, etc., you can enter its e-mail address here. With it, Citavi can automatically compose an e-mail message to the service provider. To place an order, on the **Tasks & locations** tab, click **Order** > **Other by e-mail**.

E-mail Text for Bookseller Orders

This cover letter is automatically included in an e-mail message to the bookseller. For example, you might include a greeting, and delivery and billing addresses. Below this text, Citavi inserts the bibliographic information of the book.

E-mail Text For Other Orders

This cover letter is automatically included in an e-mail message to the service provider. For example, you might include a greeting, and delivery and billing addresses. Below this text, Citavi inserts the bibliographic information of the reference.

15.1.6 Scanner

Bar Code Scanner: Other or No Scanner

You can use a bar code scanner or scanning pen to quickly enter the ISBN numbers of books and other media. If you do not own a scanner supported by Citavi, or you are using a scanner that simulates a keyboard (such as most text scanning pens and corded bar code scanners) select **Other or no Scanner**.

Bar Code Scanner: Symbol CS1504

The Symbol CS1504 bar code scanner from Motorola is a handy product for scanning ISBN numbers. It has an internal memory of around 150 numbers.

Bar Code Scanner: Scanndy or SmartScanndy

The Scanndy and SmartScanndy scanners from Panmobil offer larger internal memory than the CS1504.

Bar Code Scanner: Opticon OPN-2001

The OPN-2001 scanner from Opticon is another handy model similar to the CS1504. Its memory can hold over 5000 bar codes.

Communication: Autodetect

Click **Start** to automatically detect the port your scanner is connected to. This can take a couple of seconds.

Communication: Port

Though the bar code scanners connect via USB, data transfer occurs through a COM port. Because your computer may have multiple COM ports, you can set which one the scanner uses, if you know it. Otherwise, use Autodetect.

Clear Scanner Memory after Transfer

Select this option if you want the scanner memory to be cleared once the bar codes have been transferred.

15.1.7 Formatting

Default Text Style for Formattable Text Fields

The default text style for formattable text fields (abstract, table of contents, quotations, thoughts) is 9-point Segoe UI (under Windows Vista or later), or Arial Unicode MS (under Windows XP). Click **Default** to restore the default style. Changes you will make here do not affect existing text.

Select **Show fonts in their own typefaces** to preview fonts in their own typefaces in font menus. This makes choosing a font easier, but slows down the font menus slightly, particularly on slower computers.

Knowledge Items: Quote Knowledge Items As

Text, citations, and bibliography: Copies the knowledge item text with citations and a bibliography.

Text and placeholders: Copies the knowledge item text with placeholders for later use with the Format publication feature.

Placeholders only: Copies only the placeholders for the references the knowledge items belong to. The text of the knowledge items is not copied.

Knowledge Items: Include Core Statements

Select this option to include the core statements when you export knowledge items or copy them to the Clipboard.

Date Format

Choose the date format Citavi uses when you right-click a field and insert the current date. Select **Custom** if none of the default formats meet your needs. Changes to this setting only affect new dates, not existing dates.

Year Derived Includes Original Publication

The **Year derived** component is used primarily in the citation style editor. It derives the year of publication of a reference in the following order:

1. Date of the reference
2. Year of the reference
3. Date of the parent reference
4. Year of the parent reference.

For each of these, **Year derived** checks if the field exists in the reference type and whether it contains anything.

When this option is selected, **Year derived** first checks whether a **year** is present in the **Original publication** field (of the reference or its parent reference) and uses it if present.

15.2 Color Coding Projects

Citavi lets you color code a project to help you identify it when it is open. All of the windows belonging to that project will then be shown in that color. This is particularly useful if you have more than one project open at the same time.

To choose the color, on the **Tools** menu, point to **Project color** and click the color you want to use.

15.3 Customizing the Overview Tab

The **Overview** tab exists to give you a place where you can collect the information you need to see at a glance.

Customizing the Overview Tab

1. In the **Reference Editor**, on the **Overview** tab, click **Customize overview**.
2. Select the checkboxes for the fields you want to appear.
3. Click **Move up** and **Move down** to arrange the fields in the order you want.
4. Some fields have sliders you can drag to set the sizes of larger text boxes.

15.4 Customizing the Reference Tab

Some bibliographic information is more important than other. In Citavi, the focus is on the fields that ultimately appears in citations — these are always shown. You can choose the other fields you want to appear.

Customizing the Reference Tab

1. In the **Reference Editor**, on the **Reference** tab, click **More fields**.
2. Select the checkboxes for the fields you want to appear.
3. If there are fields you only use sometimes, you can select the **Show all non-empty fields on the Reference tab automatically** checkbox. Then the field only appears when it contains something.

15.5 Custom Fields

In addition to the standard additional fields, Citavi also provides you with nine **Custom fields** you can use to save information that doesn't fit in another field. You can edit the name of the custom field to make it clear what it contains.

Adding Custom Fields

1. In the Reference Editor, switch to the **Reference** tab.
2. Click **More fields**.
3. Select the checkboxes for the custom fields you want to appear on the Reference tab. If you don't select them, you can always use the More Fields window to access them. See Customizing the Reference Tab.

Editing a Custom Field

1. On the **Reference** tab, or in the More Fields window, click the current name of the custom field you want to edit.
2. Type a new **name**.
3. Select the **Sort order** for the field. You can choose from alphabetical order, by date, or by number.
4. The **Default** is the text you want to be automatically entered when you add a new reference. Changes to the default text only affect new references, not the contents of the field in existing references.
5. Select **Show as list** if you want the field to offer a drop-down list with autocomplete.
6. Click **OK** to finish.

Entering Text in a Custom Field

1. Switch to the **Extras** tab. (Or to the **Reference** tab if you added a custom field to that tab.)

2. Click in the custom field and type your text. If you selected **Show as list**, Citavi will automatically offer suggestions for previously used words and names. Press **Tab** or **Enter** to accept the suggestion, or keep typing or press **Esc** to reject the suggestion.

15.6 Customizing Quick Help

Almost every window in Citavi has Quick Help instructions for every field and control to help you enter information correctly and help you understand options. You can customize the Quick Help texts to add extra information for your particular situation.

Customizing a Quick Help Text

1. For text fields, place the insertion point into the field whose help text you want to modify. For other controls, move the mouse over the control, then move directly to the Quick Help area without moving the mouse over other controls.
2. Press **Ctrl+Shift+F12**.
3. Citavi opens the Quick Help text in an editor, where you can change it as needed.

Citavi saves modified help topics in the **Custom Help** folder, located by default at **`My Documents\Citavi 3\Custom Help`**. To revert to the original text, delete the custom help file.

Determining Which Quick Help Text is in Use

To see which Quick Help text is currently being displayed, press **Ctrl+F12** to display the **About This Quick Help Text** window.

15.7 Adding Dictionaries

Citavi includes a spelling checker for the texts on the **Content** and **Quotations** tabs.

The following languages are installed by default:

- English (United States)
- English (United Kingdom)
- Dutch
- French
- German (Austria)
- German (Germany)
- German (Switzerland)
- Italian
- Portuguese (Portugal)
- Russian
- Spanish (Spain)

Adding Dictionaries

1. Load http://extensions.services.openoffice.org/en/dictionaries
2. Find the language you need and click it.
3. Click **Get it** to download the spell check dictionary.
4. Change the file extension of the downloaded file from **.oxt** to **.zip**.
5. Right-click the ZIP archive and click **Extract All**.
6. Review the license agreement for the dictionary.
7. Move the files with the extensions **.aff** and **.dic** to:
   `My Documents\Citavi 3\Settings\ProofingTools`.

8. Restart Citavi.

15.8 Using Settings Files

By creating settings files, librarians or technology specialists can give students, faculty, and staff access to the collection of bibliographic databases and catalogs the organization subscribes to. A valid site license is a prerequisite for creating settings files.

15.8.1 Exporting Settings Files

Preparing to Export Settings

Before you create a settings file, choose all the options in Citavi that you think will be useful for members of your organization. Key settings are listed below as "recommended".

Databases for Online Search (recommended)
Use Online Search to select all the information resources that you want to offer your users. For subscription databases, check whether a username and password are necessary in addition to or instead of IP-based authentication.

Note: Citavi uses the Z39.50 protocol, which often uses different authentication than Web versions of the same database. If necessary, contact the database provider for login credentials or to enable Z39.50 access.

Databases for ISBN Download (recommended)
Under **Tools** > **Options** > **Search** > **ISBN download**, choose the databases to use for ISBN searches. Ideally, put your library's catalog at the top of the list so that when users search for a book by ISBN, call numbers for your library are automatically saved if the library has the book.

Libraries for Find Library Locations (recommended)
Citavi can search the libraries you choose to find locations (call numbers) of a book. To select the libraries to search, click **Tools > Options > Search > Location search**.

Import Filters (recommended)
Under **File** > **Import** > **Text file** > **Add import filter**, add import filters for the formats frequently used by online databases, such as Web of Science.

OpenURL Settings (recommended)
If your university has a link resolver, enter its Base URL under **Tools > Options > OpenURL**.

Online Booksellers
Citavi can place book orders at online booksellers. You can select the booksellers that Citavi uses under **Tools > Options > Ordering**.

E-mail Addresses for Orders
Citavi can compose e-mail messages for orders. You can enter the e-mail addresses under **Tools > Options >**

Ordering. If your organization has a bookstore, enter its e-mail address there.

User name
When starting Citavi for the first time, Citavi asks you to choose a user name and initials. Citavi uses these to log changes. (You can change your user name and initials under **Tools > Options > General**.) Select this option to include the user name and initials in the exported settings. This option is useful if you use Citavi on different computers and want to take your settings with you.

Proxy Settings
If the members of your organization must use a proxy server to access the Internet, enter the settings for the proxy server under **Tools > Options > Search > Proxy settings**.

Citation Styles
If your organization calls for a specific citation style for publications to be formatted in, select the style. You can choose additional styles if needed.

Exporting Settings Files

1. On the **Tools** menu, select **Import or export settings**.
2. Click **Export**.
3. Click **Browse**, choose a location and name for the file, and click **Next**.
4. Select the settings you want to export and click **Next**.
5. Select whether login credentials are saved in the settings file. If necessary, set an expiration date for the saved login credentials. (If no date is provided, the login credentials will expire when the site license expires). To export login credentials for subscription databases, you need a special administrator license for your Citavi site license, which you can request from Swiss Academic Software by e-mail. If you are not using an administrator license, this step is skipped. Login credentials are encrypted.
6. Click **Finish**. Citavi creates a file with the ending .csd. You can now forward this file to individuals or make it available for download on your website.

Hint: Depending on how your Web server is configured, the .csd file may be displayed in the browser instead of being downloaded. If this is the case, either ask your webmaster to configure the server, or just compress the file as a ZIP archive first, since most Web servers handle ZIP correctly.

15.8.2 Importing Settings Files

If your organization has created a settings file for you, you should import it. The settings file usually will allow you to access many of the online resources your organization offers.

Settings files can contain login credentials for subscription databases. You can only use these if you use a license key issued under your organization's site license. The login credentials will *not* be imported if you are using Citavi Free, a site license from another organization, or a personal license.

Importing Settings Files

1. On the **Tools** menu, click **Import or export settings**.
2. Click **Import** and then click **Browse**.
3. Choose the settings file and click **Open**.
4. Select the settings you want to import and click **Finish**.
5. Citavi tells you that the import was successful. Click **OK**.

Note: If the settings file is in a ZIP archive, you first need to extract the file before you can import it into Citavi. To extract it, right-click the file name and then click **Extract all**. Then import the resulting .csd file.

16. Useful Tips

In this chapter you will find useful tips to make working with Citavi even easier:

- Entering Text with a Scanner or Speech Recognition
- Using Keyboard Shortcuts
- Eliminating Duplicates
- Maintaining Lists
- Inserting More Special Characters
- Applying Text Formatting
- Using the Spelling Checker
- Inserting Tables
- Inserting Formulas
- Using Relative Paths
- Magnifying Field Contents
- Preparing Citavi for Presentations

16.1 Entering Text with a Scanner or Speech Recognition

If you need to copy a lot of text from printed sources, a **scanning pen** can be a good investment. Just scan across a line of text in a book or article. When you lift the scanning pen, the scanner's software automatically performs *optical character recognition* (OCR) to change the scanned image into editable text. This is an imperfect process, and it depends on the quality of the print (newspaper is particularly difficult to scan) as well as how smoothly you scan the pen. The scanned text is then inserted in Citavi.

You can use any corded scanning pen. Scanning pens with internal memory are more difficult to use.

If you have larger amounts of text to scan, a **flatbed** or **document scanner** can make more sense. The scan faster and with fewer errors. The downside is that you generally scan by the page even if you only need one sentence.

If you only need to scan now and then, you can also use a **digital camera** with OCR software.

Another alternative to typing is **speech recognition software**. Windows Vista and later include basic speech recognition software, though for frequent use you may want to consider commercial speech recognition software such as Dragon NaturallySpeaking.

16.2 Keyboard Shortcuts

General Commands

Command	Shortcut	
Open	**Ctrl+O**	E.g. open a project or citation style
Save	**Ctrl+S**	
Save as	**F12**	E.g. project bibliography, compilation, task list, or keyword list
Help	**F1**	
Edit active Quick Help text	**Ctrl+Shift+F12**	
Show properties of active Quick Help	**Ctrl+F12**	

text		

Editing

Command	Shortcut	
Undo	**Ctrl+Z**	In text boxes
Redo	**Ctrl+Y**	In text boxes
Copy selection to Clipboard	**Ctrl+C**	
Cut	**Ctrl+X**	
Paste	**Ctrl+V**	
Delete selection	**Delete**	
Select all	**Ctrl+A**	
Edit selected item	**Enter**	
Rename	**F2**	E.g. a category
Print	**Ctrl+P**	
Toggle checkbox	**Space**	
Reject autocomplete suggestion	**Esc**	

Navigating

Command	Shortcut	
Move focus to next item	**Tab**	
Move focus to previous item	**Shift+Tab**	
Move to next tab	**Ctrl+Tab**	
Move to previous tab	**Ctrl+Shift+Tab**	
Move to previous list item	**Up Arrow**	
Move to next list item	**Down Arrow**	
Go to first list item	**Home**	
Go to last list item	**End**	
Scroll up one page	**Page Up**	
Scroll down one page	**Page Down**	
Open field editor window	**F9**	
Set focus to primary **Go to** box	**Ctrl+E**	
Set focus to secondary **Go to** box	**Ctrl+Alt+E**	
Show menu for field	**F4**	
Open zoomed editor	**F8**	

Using Menus

Command	Shortcut	
Keyboard navigation focus	**Alt**	
Show right-click menu	**Shift+F10**	

Entering Special Characters

Command	Shortcut	
Convert last 4 digits to the corresponding Unicode character	**Ctrl+Alt+U**	
Insert non-breaking space	**Shift+Space**	

Citing

Command	Shortcut	
Copy placeholder or quotation to Clipboard	**Ctrl+Alt+C**	
Insert placeholder or quotation in word processor	**Ctrl+W**	
Insert placeholder or quotation in word processor as footnote	**Ctrl+Shift+W**	
Insert or copy placeholder or quotation with options	**Ctrl+Alt+Shift+W**	

Main Window: Project Handling

Command	Shortcut	
Close project	**Ctrl+F4**	
Print project bibliography, compilation, task list	**Ctrl+P**	
Print project bibliography, compilation, task list with options	**Ctrl+Shift+P**	
Print grouped project bibliography	**Ctrl+Alt+P**	
Print task table	**Ctrl+Alt+Shift+P**	
Save project bibliography, compilation, task list	**F12**	
Save project bibliography, compilation, task list with options	**Shift+F12**	
Save grouped project bibliography	**Ctrl+Alt+F12**	
Copy or move to another Citavi project	**Ctrl+Alt+V**	

Main Window: Navigating

Command	Shortcut	

Previous reference	**Alt+Up Arrow**	
Previous reference	**Alt+Down Arrow**	
Back (in history)	**Alt+Left Arrow**	
Next (in history)	**Alt+Right Arrow**	
Go to first reference	**Home or Ctrl+Alt+Up Arrow**	
Go to last reference	**End or Ctrl+Alt+Down Arrow**	
Cancel selection	**Ctrl+Alt+A**	

Main Window: Adding New Items

Command	**Shortcut**	
New reference	**Ctrl+N**	
Retrieve by ISBN, DOI, or PubMed ID	**Ctrl+Shift+N**	
New Journal Article	**Ctrl+Shift+J**	
New Internet Document	**Ctrl+Shift+R**	
New Book	**Ctrl+Shift+B**	
New Edited Book	**Ctrl+Shift+E**	
New Contribution	**Ctrl+Shift+U**	
New text thought	**Ctrl+I**	
New image or file thought	**Ctrl+Shift+I**	
New project task	**Ctrl+T**	
New reference task	**Ctrl+Shift+T**	
Add local file (location)	**Ctrl+Shift+F**	
Add local folder (location)	**Ctrl+Alt+Shift+F**	
Add Internet address (location)	**Ctrl+Shift+A**	
Add library location	**Ctrl+Shift+Y**	
Add Private Collection location	**Ctrl+Alt+Shift+Y**	
New link to	**Ctrl+Shift+L**	
New link from	**Ctrl+Alt+Shift+L**	
New direct quotation	**Ctrl+D**	
New indirect quotation	**Ctrl+Shift+D**	
New summary	**Ctrl+Alt+Shift+D**	
New image or file quotation	**Ctrl+Shift+G**	
New comment	**Ctrl+Shift+M**	

Add comment to selected knowledge item	**Ctrl+Alt+Shift+M**	
New keyword	**Ctrl+Shift+K**	
New category	**Ctrl+Shift+–**	
New subcategory	**Ctrl+Alt+Shift+–**	

Main Window: Editing

Command	**Shortcut**	
Delete reference	**Ctrl+Delete**	
Set blue label	**Ctrl+0**	
Clear blue label	**Ctrl+Alt+0**	
Set red label	**Ctrl+9**	
Clear red label	**Ctrl+Alt+9**	
Edit short title	**Ctrl+Alt+S**	
Update BibTeX keys	**Shift+F5**	

Changing the Workspace Layout

Command	**Shortcut**	
Switch to Reference Editor	**Ctrl+1**	
Switch to Knowledge Organizer	**Ctrl+2**	
Switch to Task Planner	**Ctrl+3**	
Show or hide left pane	**Alt+1**	
Show or hide middle pane	**Alt+2**	
Show or hide right pane	**Alt+3**	
Show or hide keywords	**Alt+4**	
Show or hide categories	**Alt+5**	
Task Planner: Switch to Quick select	**Alt+4**	
Task Planner: Switch to Advanced selection	**Alt+5**	
Toggle Preview and Quick Help	**Alt+9**	
Show table	**Ctrl+Alt+T**	
Online search	**Ctrl+L**	
Check availability with OpenURL	**Ctrl+Alt+L**	
Search	**Ctrl+F**	
Program options	**Ctrl+,**	
Open macro editor	**Alt+F11**	
Show More Fields	**Ctrl+Alt+F**	In the Reference Editor, on the **Reference** tab

Edit related reference	**Shift+Enter**	In the Knowledge Organizer and Task Planner
Edit related reference in new window	**Alt+Shift+Enter**	In the Knowledge Organizer and Task Planner

Publishing

Command	Shortcut	
Copy formatted reference to Clipboard	**Ctrl+Shift+C**	
Open Publication Assistant	**F7**	
Select document for Format Publication	**Ctrl+F7**	
Format Publication with last document used	**Ctrl+Shift+F7**	
Automatic BibTeX export	**Alt+F7**	Only if TeX support is activated in the options
Automatic BibTeX export with last document used	**Alt+Shift+F7**	Only if TeX support is activated in the options
Browse citation styles	**F11**	
Edit citation style	**Shift+F11**	

Managing Categories and Keywords

Command	Shortcut	
Batch apply keywords	**Ctrl+Alt+H**	
Batch remove keywords	**Ctrl+Alt+Shift+H**	
Batch assign categories	**Ctrl+H**	
Batch remove categories	**Ctrl+Shift+H**	
New category	**Ctrl+Shift+–**	
New subcategory	**Ctrl+Alt+Shift+–**	
Expand category	**Right Arrow**	
Collapse category	**Left Arrow**	
Expand all categories	**Ctrl+Alt+Shift+Right Arrow**	
Collapse all categories	**Ctrl+Alt+Shift+Left Arrow**	
Demote	**Ctrl+Alt+Right Arrow**	
Promote	**Ctrl+Alt+Left Arrow**	
Move category up	**Ctrl+Alt+Up Arrow**	
Move category down	**Ctrl+Alt+Down Arrow**	

Editing Abstracts, Tables of Contents, Evaluations, and Quotations

Command	Shortcut	
Character formatting	**Ctrl+D**	
Paste	**Ctrl+V**	Inserts text and matches formatting
Paste with formatting	**Ctrl+Shift+V**	Inserts text as formatted on the Clipboard
Reset all	**Ctrl+Space**	Resets all formatting except bold, italic, text color, tables, and indents
Remove paragraphs and tabs	**Ctrl+Shift+Spac e**	
Show hidden formatting symbols	**Ctrl+Shift+3**	
Bold	**Ctrl+Shift+B**	
Italic	**Ctrl+Shift+I**	
Superscript	**Ctrl+Shift+1**	
Subscript	**Ctrl+Alt+3**	
Underline	**Ctrl+Shift+U**	
Double underline	**Ctrl+Shift+D**	
All caps	**Ctrl+Shift+G**	
Small caps	**Ctrl+Shift+Q**	
Hidden	**Ctrl+Shift+H**	To show hidden text, on the **View** menu, click **Show hidden text**
Align left	**Ctrl+L**	
Align right	**Ctrl+R**	
Align centered	**Ctrl+E**	
Align justified	**Ctrl+B**	
Add or remove space before a paragraph	**Ctrl+0**	
Single line spacing	**Ctrl+1**	
Double line spacing	**Ctrl+2**	
One-and-a-half line spacing	**Ctrl+5**	
Increase indent	**Ctrl+M**	
Decrease indent	**Ctrl+Shift+M**	
Insert tab	**Ctrl+Tab**	

Editing in the Table

Command	Shortcut	
Edit selected item in main window	**Enter**	
Cancel selection	**Ctrl+Alt+A**	

Set blue label	**Ctrl+0**	
Clear blue label	**Ctrl+Alt+0**	
Set red label	**Ctrl+9**	
Clear red label	**Ctrl+Alt+9**	
Refresh	**F5**	Only necessary if the table is grouped and data has changed
Print project bibliography	**Ctrl+P**	
Print project bibliography with options	**Ctrl+Shift+P**	
Print table	**Ctrl+Alt+P**	
Save project bibliography	**F12**	
Save project bibliography with options	**Shift+F12**	
Copy or move to a Citavi project	**Ctrl+Alt+V**	
Open Publication Assistant	**F7**	
Select document for Format publication	**Ctrl+F7**	
Format publication with last document used	**Ctrl+Shift+F7**	
Automatic BibTeX export	**Alt+F7**	Only if TeX support is activated in the options
Automatic BibTeX export with last document used	**Alt+Shift+F7**	Only if TeX support is activated in the options
Browse citation styles	**F11**	
Edit citation style	**Shift+F11**	

Navigating Grouped Tables

Command	**Shortcut**	
Expand group	**Right Arrow**	
Collapse group	**Left Arrow**	
Expand all groups	**Ctrl+Shift+Right Arrow**	
Collapse all groups	**Ctrl+Shift+Left Arrow**	

Navigating Search Results

Command	**Shortcut**	
Previous result	**Page Up**	
Next result	**Page Down**	

16.3 Eliminating Duplicates

If you run searches on the same topic using different information providers, it is almost inevitable that a reference may appear two or more times in your Citavi project. Duplicates waste time and space and distract you from your work.

Citavi helps you find and eliminate duplicates. Books with identical ISBN numbers or library accession numbers (these numbers are imported into a hidden field when searching online) will be identified as duplicates. If the ISBN or accession number is unique or missing, or for any other reference type, Citavi compares the name of the author, the title and the year of publication.

Searching for and Deleting Duplicates

1. In the **Reference Editor**, on the **References** menu, point to **Find duplicates** and then click Show **duplicates only**.
2. After a moment, Citavi displays duplicate references.
3. Compare the references and delete the duplicates.

Hint: Table view is ideal for comparing, selecting, and deleting duplicates.

16.4 Maintaining Lists

When you add and edit references, there are many words and names you use repeatedly, such as the names of authors, libraries, and organizations. When you enter one of these in a reference, Citavi automatically remembers it in the list. Then, when you add or edit another reference, Citavi automatically shows you the list when you begin to type. Click a suggestion to accept it, or use the arrow keys if necessary and then press **Tab** or **Enter** to accept. To reject a suggestion, keep typing, or press **Esc**.

Citavi keeps lists for the following fields:

- Persons and organizations
- Keywords
- Periodicals
- Publishers
- Libraries
- Series

You can edit these lists to change incorrect entries, delete old entries, add new ones, and add notes to entries. The list also lets you see which references use a particular list item. To view and edit a list, switch to the **Reference Editor** or **Knowledge Organizer**, and on the **Lists** menu, click the list you want to edit.

For example, you can elaborate on a keyword the **Notes** field.

Editing a List

On the **Lists** menu, click the list you want to edit.

- To edit a list item, double click it.
- To delete unused entries, on the **Edit** menu, click **Select unused** and then click **Delete** or press **Ctrl+Delete**.
- To merge two items (for example, two keywords that mean the same thing, or two spellings of a person's name), highlight the two items you want to merge, then click **Merge**. Alternatively, you can drag one item onto another to merge them.

Note: Items added to a list automatically (because they are used by a reference) are automatically removed as well, if all references using them are removed. However, with the exception of libraries, any list items that you add or edit manually are protected and Citavi will not delete them, even if they are not used by any references.

Importing Lists from Other Citavi Projects

To use a list of keywords, persons, or publications in another project, you can import a list from another Citavi project:

1. Open the destination project.
2. On the **Lists** menu, select the list you want to import into.
3. In the list editor window that appears, on the **File** menu, click **Import from Citavi Project**.
4. In the file dialog, select the Citavi project file containing the list you want to import and press Open.

Special Case: Places (of Publication)

Citavi remembers the names of places you enter (for example, place of publication). When entering new references, you can choose an existing name to save time. Just click the arrow in the **Place of publication** field and then click the place you want to use.

To delete or edit a place name, just edit or clear the name in the field.

16.5 More Special Characters

Typographical Punctuation

In Citavi, you can use typographical punctuation marks to make your layout publication meet professional requirements — specifically dashes, ellipses, and quotation marks.

- The **ellipsis** (**…**) character prevents your word processor from breaking the line in the ellipsis. When used in a quotation, the ellipsis should be inside brackets.
- The **dash** comes in two lengths. The **en dash is** used in number ranges, such as date ranges (2004–2006), pagination (pp. 16–35), and in complex compounds (e.g. hyphenated compounds containing another compound). In most English styles, the **em dash** is used to set off a parenthetical phrase. Other languages or styles may follow different usages.

To enter typographical punctuation marks in a text field in Citavi, right-click in the text field and point to **Special Characters** and click the punctuation marks you want to insert. You can also type in a special character by entering its four-digit code while holding the Alt key. Additionally, all text fields that allow formatting have toolbar buttons to insert these characters.

	Name	Alt code
–	En dash	Alt+0150
—	Em dash	Alt+0151
…	Ellipsis	Alt+0133
‘	Left single quotation mark	Alt+0145
’	Right single quotation mark	Alt+0146
‚	Low single quotation mark	Alt+0130
“	Left double quotation mark	Alt+0147
”	Right double quotation mark	Alt+0148
„	Low double quotation mark	Alt+0132

«	Left double angle quotation mark	Alt+0171
»	Right double angle quotation mark	Alt+0187
‹	Left single angle quotation mark	Alt+0139
›	Right single angle quotation mark	Alt+0155

Note that many typographical characters appear similar to punctuation on the keyboard. For example, the single angle quotation marks (‹ and ›) are not the same as the less-than and greater-than signs (< and >) found on most keyboards.

Non-Breaking Punctuation

Citavi also provides quick access to non-breaking spaces and non-breaking hyphens. These special versions of the space and hyphen are used to prevent a phrase from being broken across two lines. Regular spaces and hyphens indicate the boundary between two words, allowing your word processor to create line breaks, while non-breaking spaces and hyphens force the words connected by them to stay on the same line in the word processor. For example, a date written as "August 1, 1291" should use non-breaking spaces to keep it together on a line.

Other Special Characters

In addition to typographical punctuation, you may occasionally need to add special characters such as letters with diacritics, for example the ÿ in *L'Haÿ-les-Roses*. There are several ways to enter these:

1. **With the Clipboard**
   This is often the fastest and most reliable way if you have an electronic document that contains the correct spelling. Copy the text to the Clipboard and then paste it into Citavi.
2. **With the Windows Character Map**
   The Character Map shows you all the characters in a font, and lets you search and copy them. In Citavi, right-click in a text field, point to **Special characters** and then click **Windows Character Map**. Click a character to enlarge it. When you have found the right one, click **Select** and then click **Copy** to copy the character to the Clipboard. Now you can paste it into Citavi or any other program.
3. **By Unicode Code Points**
   Every character can be identified by its Unicode code point, typically four digits prefixed with U+, for example, `U+00FF` for **ÿ**. Citavi can convert the code point to the correct character for you. Type the four digits of the code point without the prefix, then press **Ctrl+Alt+U** and Citavi will convert the character.
4. **Windows Alt Codes**
   A smaller selection of characters also have Alt codes, a 1 to 4 digit number prefixed with Alt+ that can be used for quick entry, for example, **Alt+0255** for **ÿ**. To enter a character, first make sure that Num Lock is turned on. Then hold the Alt key while you type the code on the numeric keypad. As soon as you release the Alt key, the character will be inserted. This works in all Windows programs.

Use Unicode code points or Alt codes for characters you enter often. To find a character's Unicode code point or its Alt code, use the Windows Character Map. When you click a character, its Unicode code point and, if available, its Alt code, will be shown at the bottom of the window.

16.6 Applying Text Formatting

The **Content** and **Quotations** tabs in Citavi offer a formatted text editor. To use it, click in the field and press **F9**.

Character Formatting

Format	Found under	Shortcut	In toolbar
Bold	**Format > Character > Font**	**Ctrl+Shift+B**	•
Italic	**Format > Character > Font**	**Ctrl+Shift+I**	•

Underline	**Format > Character > Font**	**Ctrl+Shift+U**	•
Double underline	**Format > Character > Font**		
Strikethrough	**Format > Character > Font**		
Superscript	**Format > Character > Font**	**Ctrl+Shift+1**	•
Subscript	**Format > Character > Font**	**Ctrl+Shift+2**	•
Small caps	**Format > Character > Font**		
All caps	**Format > Character > Font**		
Hidden	**Format > Character > Font**		
Protected	**Format > Character > Font**		
Font name	**Format > Character > Font**		•
Font size	**Format > Character > Font**		•
Text color	**Format > Text color**		
Underline color	**Format > Character > Advanced**		
Character spacing	**Format > Character > Advanced**		

When you paste text into the formatted text editor, Citavi automatically removes all formatting except for bold and italic. To keep all formatting, in the formatted text editor, on the **Edit** menu, click **Paste formatted** (or press **Ctrl+Shift+V**).

To remove all formatting other than bold and italic *after the fact*, on the **Format** menu, click **Reset all**.

Paragraph Formatting

For most purposes, it makes sense to apply paragraph formatting in your word processor, not in Citavi.

Format	Found under
Alignment: left, centered, right, justified	**Format > Paragraph > Indentation and spacing**
Indentation: left, right, first line	**Format > Paragraph > Indentation and spacing**
Spacing: before, after, line spacing	**Format > Paragraph > Indentation and spacing**
Widow/orphan control	**Format > Paragraph > Line and page breaks**
Keep lines together	**Format > Paragraph > Line and page breaks**
Keep with next paragraph	**Format > Paragraph > Line and page breaks**
Page break before	**Format > Paragraph > Line and page breaks**

When pasting text from PDF documents, you will often find that each line ends in a line break, disrupting the natural flow of the text. This is a nuisance when transferring the text to other programs. To remove the unwanted line breaks, in the formatted text editor, on the Format menu, click **Remove paragraphs and tabs**.

16.7 Spelling Checker

On the **Content** and **Quotations** tabs, you can click the blue field labels to open editor windows (or press **F9**). These windows provide a spelling checker.

Applying a Spell Check Language

If you write a text (or part of one) in a language other than the default spell check language, you can tell Citavi to use a different spell check language for a passage.

1. Select the text you want to apply a different language to.
2. On the **Spelling** ( ) menu, click the language you want to apply.

If the language you need is not available on the **Spelling** menu, you can add it in the spelling options.

Correcting a Spelling

To correct a spelling, just right-click the misspelled word (shown with a wavy red underline) and click the suggestion you want to accept.

Spelling Options

On the **Tools** menu, click **Spelling**.

- If you want Citavi to highlight misspelled words as you write, select the **Check spelling while you type** checkbox.
- Choose the **Default spell check language for new quotations, abstracts, etc.** This does not apply to existing entries, and you can apply a different language to a passage at any time.
- Select the checkboxes for the languages you use. These appear in the **Spelling** menu.

If the languages you need do not appear in the list, you can add them from the dozens of spell check dictionaries that are available for download at no cost.

16.8 Inserting Tables

The formattable text fields on the **Content** and **Quotations** tabs allow you to insert tables.

Inserting Tables

1. Open the formattable text editor window for the field by clicking the field label or pressing **F9**.
2. On the **Table** menu, point to **Insert** and click **Table**.
3. Choose the numbers of columns and rows and then click **OK** to insert the table.

16.9 Inserting Formulas

When working with mathematical or chemical formulas, they can be inserted in formattable text fields, such as knowledge items, abstracts, or tables of contents.

If you are using TeX, you can also use Citavi's formula editor.

Inserting a Formula into a Field

1. Generate the formula in an external editor (such as the Word formula editor).
2. Copy the formula to the Clipboard (**Ctrl+C**).

3. Switch to Citavi and open the formattable text editor for the field you want to edit by clicking its field label or pressing **F9**.
4. On the **Edit** menu, click **Insert formatted** (**Ctrl+Shift+V**).

Notes: Citavi converts the pasted formula to a picture, so it cannot be edited in the formula editor. Be sure to save the original file from the editor.

16.10 Using Relative Paths

In a computer file system, a path shows the complete route to a file or folder.

These instructions only apply when using the **Link the file, but don't move it (not recommended)** option.

By default, Citavi uses *absolute paths*, which specify the absolute location of a file, independent of other files. For example, if you link a PDF file to a reference, the Location field of a local file might show a path like this:
"`C:\Users\Me\Documents\Projects\Thesis\Documents\ALA_Standards.pdf`".
However, on your office computer, the path might be different, for example:
"`V:\Team\Johnson\Thesis\Documents\ALA_Standards.pdf`"
If you work on two computers, this can lead to problems because files may not be found.

Instead, you can choose to use *relative paths*, which show the location of a file *relative to your project file*. Turn on the **Use relative paths** option in Citavi on both computers, and keep linked files together with the project folder. A good practice is to create a folder for attachments in the same folder as the Citavi project. Then, any time you copy or move the project, just copy or move the attachments folder with it.
If you have been using absolute paths and then change to relative paths, existing references will not change automatically.

Important: To use relative paths, the linked files must be on the same drive as a project file. You cannot use relative paths across drive letters.

Please note that relative paths do not work on UNC paths (e.g. `\\SERVERNAME\D$`). UNC paths are often used in large organizations. Ask your system administrator if they can map your UNC path to a drive letter. Then link your files from the mapped drive.

16.11 Magnifying Field Contents

You can magnify the contents of the fields on the Reference tab. Just place the insertion point in the field and press **F8** to open the zoomed editor. You can also use the **Magnifier** in Windows.

16.12 Preparing Citavi for Presentations

Here are some handy tips for presenting Citavi in training sessions.

Reverting to Factory Settings

To make sure that training participants are using default Citavi settings, in the Citavi folder for user data (by default, `My Documents\Citavi 3`), delete the `Settings` folder. The license key will remain intact.

Enabling Projector Mode

When presenting in bright environments or when using a video projector with low contrast, on the **Tools** menu, point to **Project color** and click **Projector mode**.

Resetting Window Sizes and Positions

When taking screenshots for training materials, we recommend using consistent window sizes. Citavi lets you easily reset to three predefined window layouts by pressing **Ctrl+Alt+Shift+1** (or **2** or **3**).

17. Technical Information

This chapter covers:

- Installation
- Reasons for Access Restrictions
- Citavi Folder Structure
- How Citavi Saves
- Images in Citavi Projects
- Citavi Transformers
- Troubleshooting Internet Connection Problems
- Additional Privacy Information

17.1 Installation

This chapter covers:

- System requirements
- Installing on a Standalone Computer
- Installing on a USB Flash Drive
- Installing on a Mac
- Installing on a Local Area Network
- Installing on a Terminal Server
- Installing on a Wide Area Network
- Defining Administrative Settings
- Deploying with a Software Distribution System

17.1.1 System Requirements

Citavi will run under the following Windows versions:

- Windows 7
- Windows Vista
- Windows XP (with Service Pack 3 and .NET Framework 3.5 Service Pack 1)
- Windows Server 2008
- Windows Server 2003 (with .NET Framework 3.5 Service Pack 1)

Most Citavi projects contain a few hundred to a few thousand references. A typical project requires 100 to 200 MB of RAM, which should not be a problem for most computers.

If the number of references increases, the memory demands increase as well. 300-400 MB of RAM are needed for a project with approximately 40,000 references (without quotations). More than 1 GB is needed for a project containing 80,000 references. A modern computer with 4 GB of RAM can comfortably handle a project this size — in other words, there is no limit to the number of references from a technical standpoint. However, for Citavi

to run optimally, we recommend up to 10,000 references per project on older computers and up to 20,000 references on newer computers.

17.1.2 Installing on a Standalone Computer

Citavi works just like any other program: you must have Windows administrator rights to install Citavi in the default folder **C:\Program Files\Citavi 3**. Please note that you will also need administrator rights to install updates.

By default, your user files are placed in the folder **Documents\Citavi 3** or **My Documents\Citavi 3**.

17.1.3 Installing on a USB Flash Drive

You can install Citavi directly on a USB flash drive. The advantage is that you can then use Citavi on any computer that meets the following system requirements.

- All computers with Windows 7 or Windows Vista
- Windows XP Service Pack 3 systems with .NET Framework 3.5 Service Pack 1

If you have not already installed Citavi on your computer (Option 1):

1. Ensure that your USB flash drive has enough free space. The program files require about 150MB; you should have enough room for your projects and files, too.
2. Double-click **CitaviSetup.exe** to begin the Setup program.
3. The setup assistant takes you through the installation.
4. When given the option to select the installation destination, choose the USB flash drive.
5. Wait until Citavi was successfully installed appears.You can now delete the **CitaviSetup.exe** file or save it for installation on other computers.

If you have already installed Citavi on your computer (Option 2):

1. Ensure you have enough free space on the USB flash drive. The program files require about 150MB; you should have enough room for your projects and files, too.
2. Start the copy of Citavi that is already installed.
3. On the **Help** menu, click **Install Citavi on a USB flash drive**.
4. The setup assistant takes you through the installation.
5. When given the option to select the installation destination, choose the USB flash drive.
6. Wait until Citavi was successfully installed appears.
7. You can now delete the **CitaviSetup.exe** file or save it for installation on other computers

The Citavi Setup is MSI-based, which can be run on your computer only one time. If you try to run the setup again, a repair program will start. This is the reason that there is a special command for a second installation. You can also use this command if you first installed Citavi on a USB flash drive and now want to install it on your computer.

Note: Installing Citavi to a USB flash drive takes longer than to a computer. You also cannot use the Pickers on a USB flash drive. The Setup will create the following folders during a USB flash drive installation: **Citavi 3** (for user files, including projects) and **Swiss Academic Software** (for program files). To start Citavi from a USB flash drive, open **Swiss Academic Software\Citavi 3\bin\Citavi.exe**.

17.1.4 Installing on a Mac

Right now, Citavi runs only on Windows. However, you have a few different options if you want to use Citavi on your Mac.

There are three third-party solutions (Parallels Desktop, VMware Fusion, and Oracle VirtualBox) which let you run a real copy of Windows on your Mac. These so-called *virtual machines* run Windows at the same time as Mac OS X, so you don't have to reboot.

Important: Parallels Desktop 5 and earlier are not supported. Use Parallels Desktop 6 or later.

To begin, click the links in the text for each virtual machine vendor's instructions and downloads. The other things you need to check:

- You must be running a Mac with an Intel processor. Older Macs with PowerPC processors cannot run these virtual machines. (There is an obsolete emulator, Virtual PC, which allows Windows to on some PowerPC Macs, but it is discontinued and runs slowly.)
- You must have enough free hard disk space on your Mac to hold the contents of the Windows virtual machine.
- Running Windows at the same time takes a lot of memory (RAM), so we recommend having plenty of RAM in the computer, 2GB minimum, 4GB recommended for regular use. If you have too little RAM, it will still work, but everything will run slower when Windows is running.

For more information, see our FAQ entry about running Citavi on a Mac.

17.1.5 Installing on a Local Area Network

Citavi can be run on a Local Area Network (LAN). However, certain changes have to be made to the .NET Framework on your computer (in addition to all other computers that you want to run Citavi on).

Installing on a LAN

A direct installation on a LAN is not possible. We recommend the following steps:

1. Perform a regular installation of Citavi (if possible, on an administrator's computer).
2. Copy the entire Citavi program folder (by default, **`C:\Program Files\Citavi 3`**) to the desired location on the LAN.
3. Download the **.NET Framework 2.0 SDK** from the Microsoft website and install it.
4. Open **Control Panel > Administrative Tools > Microsoft .NET Framework 2.0 Configuration**.
5. Open **Console Root > .NET Framework 2.0 Configuration > Runtime Security Policy > Machine > Code Groups > All_Code > LocalIntranet_Zone**.
6. Click **Add a Child Code Group**. Name it `Citavi LAN FullTrust` and click **Next**.
7. Under **Choose the condition type for this code group**, click **URL**. and in the **URL** field, enter the full path to the Citavi program folder on the LAN (from step 2), followed by a backslash and asterisk. For example, if the Citavi program folder is **`H:\Shared Programs\Citavi 3`**, then enter `H:\Shared Programs\Citavi 3\*`. This allows items within the folder to inherit the rights from the parent folder. Then click **Next**.
8. Click **Use existing permission set** and then click **FullTrust**. Then click **Next** and then click **Finish**.

This allows Citavi to run on the administrator's computer. Since performing the entire process above on every client computer would be far too time-consuming, the .NET Framework SDK lets you save the changes as a deployment package you can easily roll out to all your client computers.

1. Open **Control Panel > Administrative Tools > Microsoft .NET Framework 2.0 Configuration**.
2. Open **Console Root > .NET Framework 2.0 Configuration > Runtime Security Policy**.

3. Click **Create Deployment Package**.
4. Click **Machine**. and choose a folder and file name for the deployment package, then click Next.

Now you can run the deployment package to share your configuration with users, including the **FullTrust** security settings for your shared Citavi program folder. Just run the deployment package on each client computer, which you can do with a software distribution system.

17.1.6 Installing on a Terminal Server

To install Citavi on a Terminal Server, please note the following:

- The Terminal Server must have .NET Framework 2.0 Service Pack 2 installed. We recommend .NET Framework 3.5 Service Pack 1. (.NET Framework 4 does not contain the necessary components, but may be installed alongside one of the versions above.)
- Citavi recommends between 100 and 200 MB RAM per session. If many users are working with Citavi at the same time, you may need to ensure that enough memory is available.
- License procedures are different. Please contact us (service@citavi.com) if you are interested in installing Citavi on a Terminal Server.

17.1.7 Installing on a Wide Area Network

Citavi does not support wide area network protocols such as WebDAV.

17.1.8 Defining Administrative Settings

You can create default settings for Citavi when running it both on client computers and Terminal Server sessions.

Step 1: Configure Citavi

Setting	Where to change	Recommended
Databases for online search	**References > Online search > Add database or catalog**	•
Databases for ISBN download	**Tools > Options > Search > ISBN download > Add database or catalog**	•
Libraries for **Find library locations**	**Tools > Options > Search > Location search > Add database or catalog**	•
Import filters	**File > Import > Text file > Add import filter**	•
OpenURL settings	**Tools > Options > OpenURL**	•
Online booksellers	**Tools > Options > Ordering**	
E-mail addresses for orders	**Tools > Options > Ordering**	
User name	**Tools > Options > General**	
Proxy settings	**Tools > Options > Search > Proxy settings**	•
Citation styles	**Citation > Citation style > Browse citation styles > Find and add style**	

Step 2: Run the Administrative Settings Assistant

Be sure to read the Quick Help texts in the Administrative Settings Assistant.

1. On the **Tools** menu, click **Options**.

2. On the **Folders** tab, click **Administrative Settings Assistant**.
3. Follow each step in the Administrative Settings Assistant.

About Administrative Settings

When Citavi starts, it checks the **bib** folder (contained within the Citavi program folder) for administrative settings files, **AdminSettings.csd** and **InitialSettings.csd** (which are both XML files).

InitialSettings.csd is only applied the very first time Citavi is run within a user account. Afterwards, the user can modify any of these settings.

AdminSettings.csd is applied every time Citavi is run. The user cannot override these settings (provided, of course, that they do not have write access to the Citavi program folder to remove the **AdminSettings.csd** file).

17.1.9 Deploying with a Software Distribution System

To deploy Citavi 3 with a software distribution system, you should use the MSI setup. You can include administrative settings and a license key file if necessary.

Deploying with Command Line Tools

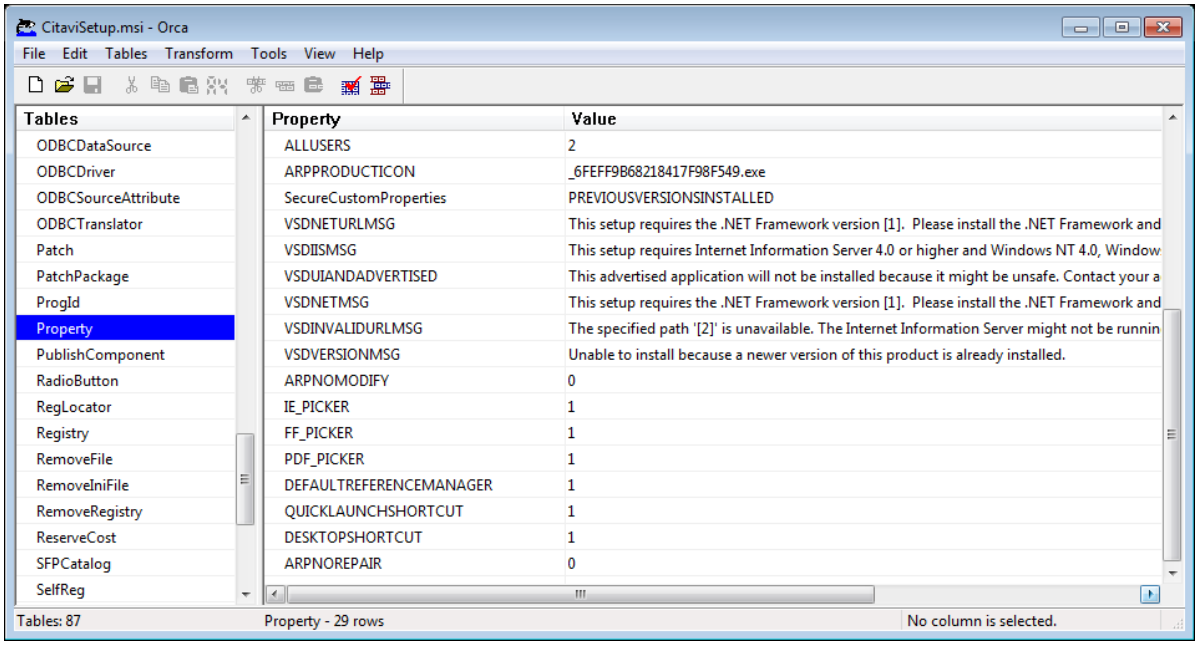
Command or parameter	Syntax
Install	`msiexec /i path_to_MSI /q`
Update	`msiexec /i path_to_MSI /q REINSTALLMODE=vomus REINSTALL=ALL`
Remove	`msiexec /x {e12c6653-1ff0-4686-adb8-589c13ae761f} /q`
Set program folder location (optional)	`INSTALLLOCATION=`
Install Picker for Internet Explorer (optional)	`IE_PICKER=1`
Install Picker for Firefox (optional)	`FF_PICKER=1`
Install Picker for Adobe Reader and Acrobat (optional)	`PDF_PICKER=1`
Open BibTeX, RIS, and ENW files with Citavi	`DEFAULTREFERENCEMANAGER=1`
Create Desktop shortcut	`DESKTOPSHORTCUT=1`

1 = install, 0 = don't install

For example, to install without the Picker for Internet Explorer, you might enter:
`msiexec /i path_to_MSI /q IE_PICKER=0`

Configuring with ORCA

Orca.exe is a tool to edit Windows Installer packages. Read more on the Microsoft developer website.



17.2 Reasons for Access Restrictions

Under the following conditions you will not be able to open a Citavi project:

Cause	Solution
A system administrator has applied Windows file permissions to the project or the folder containing the project and you do not have permission to open it.	Please ask your system administrator to grant you permission to access the project or folder.
You are trying to open a team project with more than 100 references, but you are using Citavi Free.	Enter your license key for Citavi Pro, Citavi Reader or Citavi Team.
The project is password-protected.	Contact the project manager for the team project and request to be added to the team.

Under the following conditions you will not be able to save changes in an open Citavi project:

Cause	Solution
A system administrator has applied Windows file permissions to the project or the folder containing the project and you do not have permission to open it.	Please ask your system administrator to grant you permission to access the project or folder.
The Citavi project is read-only.	In Windows Explorer, right-click the Citavi project file and then click **Properties**. Click **General** and then clear the **Read-only** checkbox.

The Citavi project is read-only because it was directly opened from a ZIP file.	Extract the project by right-clicking the ZIP file and clicking **Extract all**. Open the extracted project file.
The Citavi project is saved on a read-only device, such as a CD-ROM or USB flash drive.	Copy the Citavi project file to your hard drive and open it from there.
You cannot save changes to a team project with more than 100 references, and are using Citavi Pro or Citavi Pro.	Enter your license key for Citavi Team.
The team project is password-protected.	Contact the project manager for the team project and request to be included in the team.
You cannot save changes to a solo project with more than 100 references, and are using Citavi Free or Citavi Reader.	Enter the license key for Citavi Pro or Citavi Team.

17.3 Citavi Folder Structure

Citavi saves all user-specific files to one location. By default, this is **`My Documents\Citavi 3`**. This folder contains the following subfolders:

- **`Backup`**: This folder contains backups of your project files.
- **`Custom Citation Styles`**: This folder contains citation styles you created yourself or modified from an existing style.
- **`Custom Help`**: This folder contains any Quick Help topics you modified.
- **`Projects`**: This folder contains a folder for each project, each containing the project files as well as the subfolders **`CitaviCovers`** and **`CitaviFiles`**. If you delete a link to a file in the **`CitaviFiles`** folder from within Citavi, it will be moved to the subfolder **`CitaviFiles\RecycleBin`**.
- **`Settings`**: This folder contains your Citavi program settings.

17.4 About Saving

Citavi automatically saves changes you make as soon as one of the following occurs:

- You switch to a different workspace
- You switch to a different tab
- You switch to another reference
- You add references from an online search or import
- One minute elapses
- You exit Citavi

Additionally, you can save manually with the automatically **File > Save** command, but this is not necessary in normal use.

17.5 Images in Citavi Projects

In Citavi, you can insert images as image quotations and thoughts. When you link an image to a reference (for example, as an image quotation) Citavi copies the image to the **CitaviFiles** folder.

17.6 Citavi Transformers

Citavi uses **Transformers** to convert to and from other formats whenever you perform an online search, or import or export another format. To ensure that references are imported optimally, Transformers need to be up to date, so they are automatically updated every time you start Citavi (provided you have an active Internet connection.)

17.7 Troubleshooting Internet Connection Problems

Some features in Citavi require an Internet connection, such as online search and adding citation styles. If you get a message saying that you don't have an active Internet connection, try the following:

1. **Check Your Internet Connection**
   Check that your Internet connection is working by visiting any website, such as www.citavi.com. If it works, then your Internet connection is working.
2. **Check Proxy Settings**
   If you are on a university or corporate network, you might connect to the Internet through a *proxy server*, which acts as an intermediary between you and the Internet. Citavi supports proxy servers, either one configured in Windows (**Start > Control Panel > Internet Options > Connections**), or one set specifically in Citavi (**Tools > Options > Search > Proxy settings**). In either case, you need the proxy settings from your system administrator. If you are using the Windows proxy settings, check whether you can load www.citavi.com in Internet Explorer (other browsers use independent settings and are not affected by the Windows proxy settings).
   Hint: If it doesn't work even with the correct settings, try selecting the **Compatibility mode for HTTP 1.0 proxies** checkbox in Citavi's proxy settings.
3. **Check Firewall Settings**
   A firewall filters Internet traffic to and from your computer, in order to add a level of security.

   There are several kinds of firewalls. The most common kinds you may have installed on your computer are ones configured by port number, and ones configured by application. Make sure that Citavi is allowed in your firewall settings.

   Citavi uses the following ports:

Port	Used for
80	Checking for updates to the Citavi program, transformers, citation styles, and available online resources.
80	Online resources accessed via Web services or other HTTP requests.
210, 20010	Online resources using the default ports for Z39.50. If a strict firewall blocks this, Citavi will route the request through the Citavi Web service on port 80.
Any	Online resources using nonstandard ports for Z39.50. If a strict firewall blocks this, Citavi will route the request through the Citavi Web service on port 80.

17.8 Additional Privacy Information

Citavi does not send any user- or computer-specific data over the Internet. Specifically, the following communication occurs:

- Each time you use a Citavi feature that uses the Internet, Citavi attempts to connect to the Citavi servers with a basic HTTP request to determine whether there is an active Internet connection.
- When Citavi is started, it connects to the Citavi servers to check for updates.

- When performing online searches, importing from files or from other programs, and when using citation styles we provide, Citavi connects to the Citavi servers to check for updated versions of the transformers and citation styles, then downloads the new version if available.
- When performing online searches, only the search term and login credentials (if necessary) are transmitted. There are two kinds of connections to online resources (catalogs and databases):
  - Web service: These online resources communicate over the ordinary HTTP protocol on the default port 80. These services are always contacted directly.
  - Z39.50: These online resources use the Z39.50 protocol that is commonly used by libraries. Though it can use any port number, ports 210 and 20010 are common. If Citavi cannot communicate with a Z39.50 service directly, it will send the request to the Citavi server using a standard port 80 HTTP request. The Citavi server then forwards the request to the Z39.50 service, and then returns the results. The Citavi server does not save any data.\
- If a Citavi program error occurs, the user is asked to send an error report e-mail message to us. If the user agrees, the user's default e-mail program opens a new e-mail message with the error report, including the Citavi version number and Windows version number. The error report may contain personally identifying information, such as a file path containing the user's user name. The user can review and edit the report before sending it. The user must send the message, it is never sent automatically.

© ©2012 Swiss Academic Software GmbH.
All rights reserved.

Product and company names mentioned in this manual may be trademarks or registered trademarks of their respective companies.

Mention of third-party products is for informational purposes only and constitutes neither an endorsement nor a recommendation. The author assumes no responsibility with regard to the performance or use of these products. All understandings, agreements, or warranties, if any, take place directly between the vendors and the prospective users. Every effort has been made to ensure that the information in this manual is accurate. The author is not responsible for printing or clerical errors.

The product described in this manual incorporates copyright protection technology that is protected by
method claims of certain U.S. patents and other intellectual property rights.

This user manual was created with Help & Manual.

Index

A

Abbreviations 147
Abstracts 50, 109
Accelerator keys 169
Access date 25
Adding
  Categories 116
  Quotations 111
  References 20
  Thoughts 114
Administrative Settings
  Assistant 159, 187
Administrator licenses 166
Adobe
  Acrobat 61, 62, 63
  Reader 61, 62, 63
Advanced search 95
Alphabet 32
AND (Boolean) 95, 96
Anthology 25
Applying keywords 88
Archive Material 25
Article 35, 37
ASCII 32
Assigning
  Categories 117
Asterisk (wildcard) 98
Audio Book 25
Audio or Video Document 25
Authentication 51, 53, 166
Author guidelines 134
Author names 141, 144
Authorization 51, 53
Authorship trigraph 28, 150
Autocomplete 24
Autosave 190
Availability 105

B

Backups 189, 190
  Options 159
Bar code scanners
  Options 162
Bar codes 21
Base URL 105
Batch modify 88
Batch retrieving 21
Bibliographic databases 51, 52, 54
Bibliographic information 6
Bibliographies 20, 122, 123
Bibliographix 64
  Importing 67
Biblioscape 65
BibTeX 55, 64, 69, 131
  Exporting to 80
  Keys 130
BibTeX keys
  In citation style editor 143
Blue labels 84, 87
Book 25, 33
Books
  Ordering at local bookstores 107
  Ordering online 107
Bookseller catalogs 50
Booksellers 107
  Online 161
Bookstores 107
Boolean operators 96
Braces 127
Brackets 95

C

Caching 159
Calc
  Exporting 82
  Importing 76
Call number 90
Capitalize first character automatically 147
Catalogs 51, 54
  Bookseller 50
  Library 50, 52
  National library 52
  Shared 52
Categories 7, 88, 115
  Adding 116
  Assigning 117
  Exporting 118
  Importing 118
Category system 7
cf. 124
Changing passwords
  Another member's 156
  Your own 156
Character Map 32
Checking for updates 3
Citation 28
Citation keys 28
  Customizing 150
  Enabling support for 157
  Exporting 150

Index

Citation keys 28
  Generating 150
  Importing 150
  In citation style editor 143
Citation style properties
  Add first names 147
  Add persons until unique 147
  Ambiguous citations 147
  Append unique letter 147
  Bullets and numbering 147
  Capitalize first letter automatically 147
  Citation system 147
  Classification 147
  Consecutive citations 147
  Consecutive citations, conditions for 147
  Create bibliography 147
  Final character 147
  Hanging indent 147
  Heading of bibliography 147
  Include parent references 147
  Language (culture) 147
  List numbers 147
  Multiple citations 147
  Paragraph formatting 147
  Quick Help 147
  Reference number options 147
  Replacements 147
  Separators 147
  Sorting 147
  Space after 147
  Subject areas 147
Citation styles 127, 134, 138
  Anatomy of 135
  Changing 84, 134
  Component properties 141, 144, 145, 146
  Components 135, 136, 139, 142
  Conditions 135, 136, 139
  Creating 134, 135, 138
  Default template 139
  Duplicating 138
  Edit state 147
  Editing 138
  Editor 138
  Elements 135, 136, 139, 142
  Files (.ccs) 138, 190
  Inheriting 140
  Properties 147
  Punctuation 140
  Punctuation in 138
  Replacements in 138
  Reusing rule sets 138, 140
  Rule sets 135, 136, 139, 140
  Special components 143
  Templates 135, 136, 139, 140
  Use cases 135, 136, 139, 140
Citavi
  Citavi Free 2, 12, 152
  Citavi Pro 2, 152
  Citavi Reader 2, 152
  Citavi Team 2, 152
Citavi Picker 88
CitaviFiles folder 86, 190
Citing 111
Clearing recent items 159
Clipboard 21, 80
Collaborating 152
Collected Edition 25
Collected Essays 40
Colons 140
Color coding 163
Column numbers 146
Commas 140
Commentary 110
Compilations 121
Components
  BibTeX key 143
  Citation key 143
  Creating 142
  Date 145
  Duplicating 142
  Edition derived 143, 146
  First footnote number 143
  Index in bibliography 143
  Numbers 146
  Page range 146
  Placeholders 142
  Properties 141, 144, 145, 146
  Quotation page range 146
  Special 143
  Text elements 142
  Year derived 143, 145
Concurrent use 156
Conference Proceedings 25
Contribution 35
  In Legal Commentary 25
Converting 64, 65, 68, 69, 70, 73
  Projects 153
Copying 80
  Formatted text 109
  Quotations 113
  References 79
Copying formatted 131
Core statements
  Generating automatically 157

Index

Court Decision 25
Cover art
  Adding 85
Criteria 93
CSV 76
Custom fields 164
Custom Quick Help 190

D

Databases 50, 51, 54, 64
Date format
  Default 163
Date of decision 25
Dates
  Formats 145
  In citation style editor 145
Deadlines 101
Default text style 163
Diacritical Characters 178
Direct import 55
Document delivery service 105
Duplicates
  Eliminating 177
Duplicating references 29

E

Edit state 147
Edited book 35
Editing
  Quotations 113
  References 84
Edition derived 146
  In citation style editor 143
Electronic Publication 38
E-mail address 154
Enable offline copies 159
Encyclopædia Britannica 45
Encyclopedia article 45
EndNote 55, 65
  Exporting to 82
EndNote Tagged 55, 73
  Exporting to 82
ENW file 55
Error reports 191
Ex Libris 105
Excel
  Exporting 82
  Importing 76
Excerpting 111
Export 64, 82
Export definition 131
Export presets 82
Exporting 64, 80
  Categories 118
  Citation key templates 150
  Citavi settings 166
  Outlines 118
  Quotation 121
  Thoughts 121
  To BibTeX 80
  To Calc 82
  To Citavi 79
  To EndNote 82
  To Excel 82
  To RIS 80

F

Festschrift 39
Field codes 95
Filter 93
Finding 92
Finding duplicates 177
Firewalls 191
First footnote
  In citation style editor 143
Float 124
Folders 190
Footnotes 124
Format publication 129
Formattable text 179, 181
Formatting guidelines 134
Formulas
  Inserting 181
Formulas (TeX) 133
Full stops (periods) 140
Full text search in all fields 92

G

Getting started 2
Graphics 190
Grouped
  Printing 123
Grouping 99
Guidelines 134

H

Help 9
HTTP requests 191

Index

I

ILL 105
Images 190
Import 64
Importing 64, 65, 68, 69, 70, 73, 191
  Access 76
  Calc 76
  Categories 118
  Citation key templates 150
  Citavi settings 166, 167
  CSV 76
  Excel 76
  Formatted bibliography 77
  Options 160
  Outlines 118
Importing team members 154
Index in bibliography
  In citation style editor 143
Initials (of Citavi user) 157
Inserting
  Knowledge items 126
  Placeholders 125
  Quotations 126
  References 125
  Thoughts 126
Installing Citavi 2, 184
  Automated 188
  On LAN 186
  On Mac 186
  On standalone computer 185
  On Terminal Server 187
  On USB flash drive 185
  On WAN 187
Interlibrary loan 105
International Standard Book Number 21
Internet connection
  Troubleshooting 191
Internet Document 25, 38
Interview Material 25
Introduction 1
IP Address 53
ISBN 107, 177
  Import list of 21
  Retrieve by 21
  Retrieving by 21
ISBN download
  Options 160

J

Journal 25, 40
Journal Article 25, 37

K

Keep in front 124
Keyboard shortcuts 169
Keywords 7, 50
  Applying 88
  Merging 177
  Multiple 88
Knowledge items 7, 119
  Inserting 126
  Quote as 163
Knowledge organization 5, 7
Knowledge Organizer 7

L

Labels
  Blue 87
  Red 87
Lecture 25
LEd 132
Legal Commentary 25
Libraries 51, 54
Library catalogs 50, 51, 52, 54
Library location 90
Licenses 189
  Administrator license keys 166
  Comparison 152
  License keys 2, 152
  Site licenses 2
Link resolver 105
Linking
  Files 86
  Folders 86
Lists
  Keywords 177
  Libraries 177
  Maintaining 177
  Periodicals 177
  Persons and organizations 177
  Publishers 177
  Serials 177
Local files 86
Location search
  Options 160
Locations 86

Index

Locations 86
Library 90
Private Collection 90
Login 51, 53
Loose-leaf collection 42
LyX 132

M

Mac and Mc (in names of persons) 30
Magnifying 182
Manuscript 25
Map 25
Merging
Keywords 177
Libraries 177
Periodicals 177
Persons and Organizations 177
Publishers 177
Serials 177
Microsoft
Access 76
Excel 76, 84
Word 129
Monograph 33
Movie 25
Moving
Quotations 113
Moving to a new computer 3
Multiple references 127
Multiple sorting 99
Multiple users 156
Multivolume work 48
Music Track 25
Musical Work / Music Album 25

N

Names
Abbreviation of periodical and series 147
Ancient 30
Author 141, 144
Biblical 30
Clerical 30
Editor 141, 144
Famous persons 30
Journal names 147
Medieval 30
Multiple last names 30
Options in citation style 141, 144
Prefixes 30
Pseudonyms 30
Royal 30
National library catalogs 52
Navigation 5, 6
Network shares 152
Networks 187
Local (LAN) 186
Wide-area (WAN) 187
New project 12, 153
News Agency Report 25
Newspaper Article 25
NOT (Boolean) 95, 96
Notes
Adding 90
Field 90
Notify members by e-mail 154
Numbered reference list 143
Numbers
Formats 146
In citation style editor 146
Numerical data 146

O

OCR 169
Online booksellers
Ordering by e-mail 161
Online Encyclopedia 45
Online Public Access Catalogs 50
Online resources 51, 52
Online search 51, 54
Options 160
Troubleshooting 191
OPAC 50, 51
OpenOffice.org
Calc 76, 84
Writer 129
OpenURL 105
Base URL 161
Options 161
Parameters 161
Operator 95
Operators
Comparison 97
Empty and not empty 97
Optical Character Recognition (OCR) 169
Options 21
Placeholder 127
Program 157, 159, 160, 161, 162, 163
OR (Boolean) 95, 96
Ordering by e-mail
E-mail text for 161
Settings 161

Index

Organizing
  Knowledge items 119
  Quotations 119
  Thoughts 119
Original texts 86
Outlines 115
  Exporting 118
  Importing 118
Overview 4

P

Page numbers 40, 146
Pagination 40
Panes
  Editing 5
  Navigation 5
  Preview 5, 9
Paragraph numbers 146
Passwords 51, 53, 156
Patent 25
Paths
  Absolute 86, 159
  Converting 159
  Relative 86, 159
  Repairing 159
  UNC 86
PDF 38, 61, 86
Periods (full stops) 140
Permissions 189
Person names 141, 144
Personal Communication 25
Picker 61, 62, 63, 88
Place of publication 177
Placeholder options
  bibcit 127
  bibonly 127
  footcit 127
  nobib 127
  nopar 127
  page§ 127
  pagecol 127
  pagemargin 127
  pageother 127
  pageroman 127
  pageromanuc 127
  personony 127
  textcit 127
  yearonly 127
Placeholders 124, 127
  Inserting 125
Ports 191
Preferred bookseller 107
Prefixes 141
  Group 144
Presentation mode 182
Presentation tips 182
Preset 82
Press Release 25
Preview 5, 6, 9
Printing 119
  Compilations 121
  Project bibliography 122, 123
  Quotations 121
  Tasks 103
  Thoughts 121
Privacy 191
Private Collection 90
ProCite 68
Professional databases 51
Program options 157, 159, 160, 161, 162, 163
Program version 3
Project bibliographies 122
  Annotated 123
  Creating 122, 123
  Exporting 122, 123
  Grouped 123
  Printing 122, 123
  Simple 122
Project color 163
Project leaders 153
Project passwords 156
Projects
  Converting 153
  Creating 12
  Deleting 12
  Folder 190
  Large 152
  Read-only 189
  Reopen last automatically 157
  Saving 190
  Small 152
  Solo 152, 153
  Team 152, 153, 189
  Terminology 4
Protected projects 153, 154, 156, 189
Protecting 152, 153
  With login 153
Proxy servers 191
  Settings 160
Publication Assistant 124, 132
  Default word processor 157
  Options 157
Punctuation

Index

Punctuation
- After 138
- Before 138
- Brackets 142
- Colon 140
- Comma 140
- Parentheses 140, 142
- Period (full stop) 140
- Return 140
- Semicolon 140
- Space 140
- Tab stop 140

Pushpin 124

Q

Question mark (wildcard) 98
Quick Help 5, 6, 9
- Customizing 165

Quick search 94
Quick search in short title 92
Quick select 93
Quotations 7, 62
- Adding 111
- Arranging 119
- Editing 113
- Image 113
- Organizing 119
- Printing 119, 121
- Secondary 113
- Sorting 119
- Text 113

Quotes 111

R

Radio or TV Broadcast 25
Read-only 152
Red labels 84, 87
Reference Editor 84
Reference lists 122, 123
Reference management 5, 6, 20
Reference management software 64, 65, 68, 69, 70, 73
Reference Manager (software) 68
Reference number system 143
Reference types 4
- Changing 28
- Overview 25

References 4, 6, 84
- Adding 24
- Deleting 84
- Duplicating 29
- Editing 84
- Full 20
- Printing 122, 123
- Short 20

Refresh 156
Refreshing changes 156
Regex 98
Regular expressions 98
Relative paths 86
- About 182

Reminders 101
Removing Citavi 4
Replacements 138
Report 44
Research 51, 54
Research databases 52
Research report 44
Resetting window layout 182
Resigning as project leader 155
Resolver 105
Retrieving
- By DOI name 21
- By ISBN 21
- By PubMed ID 21

Returns
- Non-breaking 140

Reverting to factory settings 182
RIS 70
- Exporting to 80

RIS file 55
Roles 152
- Author 154, 155
- Changing 155
- Project leader 154, 155
- Reader 154, 155

S

Save a copy 153
Saved search 54
Saving 190
Scanners
- Bar code 21
- Document 169
- Flatbed 169

Scanning pens 169
Schedule 8
Scheduling 8
Search portals 51
Searching 51, 54, 92
- Advanced 95
- Operators 96

Index

Searching 51, 54, 92
  Quick 94
  Regular expressions 98
  Search strategy 50
  Search terms 50
Searching for duplicates 177
Secondary quotations 113
Selection 94
Semicolons 140
Sequence number
  Insert in placeholder automatically 157
Sequence numbers 124
Settings
  Default 187
  Exporting 166, 187
  Folder 190
  Importing 166, 167
  Reverting to factory 182
Setup 2
SFX 105
Shared catalogs 52
Shared drives 152
Shared folder 152
Short title 24, 28
Show all fields 28
Show as list 164
Site license 2
Small caps 134
Software 25
Software distribution system 188
Sorting 84, 99
Source of bibliographic information 86
Spaces 140
  Non-breaking 127
Special abbrevations 146
Special characters 32, 178
Special Issue 25, 40
Speech recognition 169
Spelling
  Checker 181
Standard 25
Statute or Regulation 25
Stylesheets 134
Subscription 53
Suffixes 141
  Group 144
Supplement 40
Support 9
Synonyms 50
System administrator 2
System requirements 184

T

Tab stops 140
Table of contents 88
Table view 99
Tables
  Inserting 181
Tabs
  Content 6
  Contents 109
  Context 6
  Overview 6
  Quotations 6, 112
  Reference 6
  Tasks & locations 6, 8
Task list 103
Task management 101
Task planning 5, 101, 103
Tasks
  Adding 101
  Planning 8
  Printing 103
Tasks & locations tab 90
Team members 156
  Adding 154
  Removing 154
Team projects 154
  Setting up 153
Terminal Server 187
TeX 132
TeX support 132
  Options 157
TeXMaker 132
TeXnicCenter 132
Text formatting 179
  Removing 109
Text quotations 112
Themed issue 40
Thesis 25
Thoughts 7
  Adding 114
  Arranging 119
  Organizing 119
  Printing 119
  Sorting 119
Tour 4
Track 25
Training sessions 182
Transformers 191
Translator 33

Index

U

UNC paths 86
Unicode 32
Uninstalling Citavi 4
Unknown 25
Unprotected projects 153
Unpublished Work 25
Updating Citavi 2, 3
URL in Internet 86
URL in Intranet 86
USB flash drive 2
User files folder 159
User name (name of Citavi user) 157
Username (database login credential) 51, 53, 166

V

Verifying accuracy 86
Views
- Tab 84
- Table 84

W

Web 64
WebDAV 187
Welcome screen 157
Wikipedia 45
Wildcards
- Asterisk 98
- Question mark 98

WinEdt 132
WinShell 132
WinTeX 132
Work report 44
Workspaces
- Knowledge Organizer 5, 7
- Reference Editor 5, 6
- Task Planner 5, 8

World Book 45

Y

Year derived 145
- In citation style editor 143
- Include Original publication 163

Z

Z39.50 191
ZIP archives 189
Zoomed editor 182
Zotero 68